NHS
Business Services Authority

Dental Portal User Manual

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1 INTRODUCTION

This guide will take you through the functions and features of the dental portal and explains how to access the various features.

The guide takes you through the initial portal activation process, logging in to your portal account and then how to access the information and features in the portal.

More functionality will become available in the portal over the next month or so and this guide will be updated to reflect the new features as soon as they become available.

In the meantime if you have any feedback on this guide or on the portal then you can email your comment to online@dpb.nhs.uk

2 INITIAL STEPS

Once your activation letter/email has been received you should be able to activate your portal account using the activation code contained in the letter or email. Click on the link (or cut and paste it into your internet browser navigation bar) to navigate to the portal activation.

If you haven't received an activation code you can request one by navigating to the Request Activation Letter page via the NHSBSA website.

When activating your portal account, you will need to enter the following mandatory details:

- Provider or Performer Number
- Activation ID
- Unique email address & confirm email address
- Password and password confirmation
- Memorable word and memorable word confirmation
- Security question
- Security answer and confirm security answer

Take care before attempting to activate your portal account to ensure that your provider/performer number is to hand since you will not be able to complete the activation process without this information. You should also bear in mind that the email address, password, memorable word and in some cases your security question and answer credentials will be required to login to the portal. Be sure to use credentials that comply with the on-screen requirements and that can be remembered easily. All of these details entered are also case sensitive.

Your email address will be used for any further portal communications, e.g. in the event of an EDI PIN request or forgotten credentials situation.

3 LOGIN

When you have completed the activation process the login page Figure 1 will be displayed:

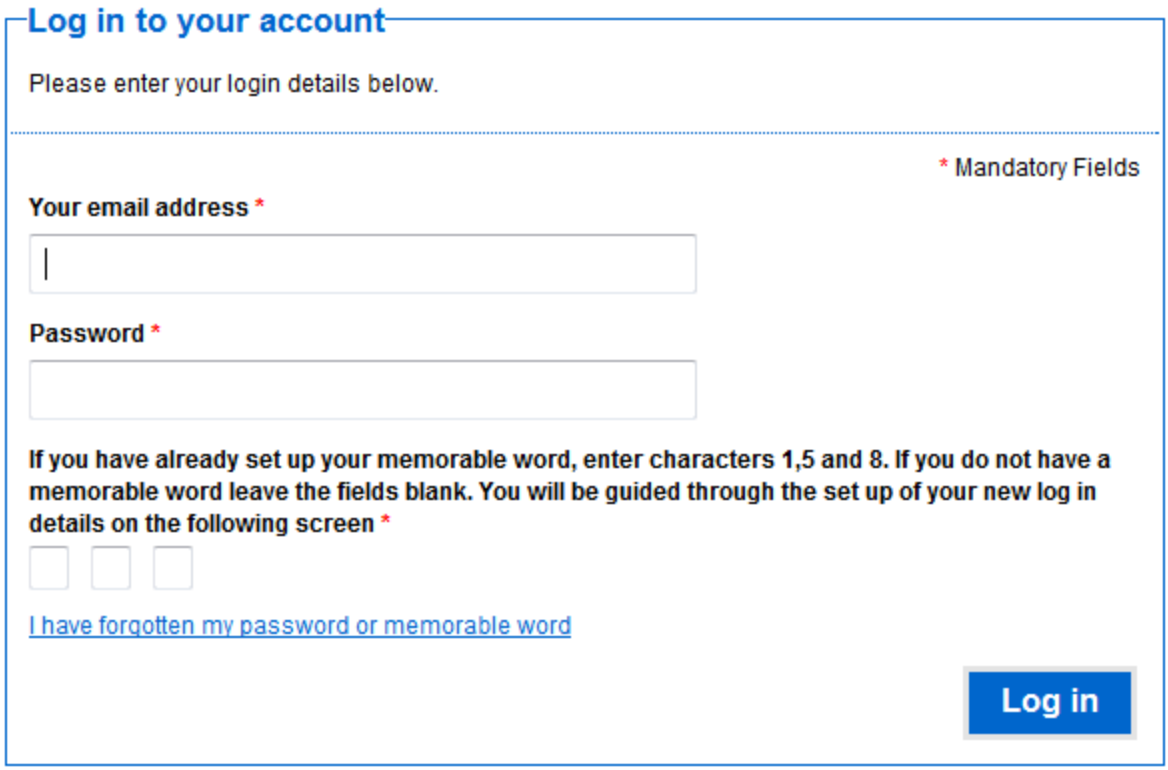

Log in to your account
Please enter your login details below.
* Mandatory Fields
Your email address *
Password *
If you have already set up your memorable word, enter characters 1,5 and 8. If you do not have a memorable word leave the fields blank. You will be guided through the set up of your new log in details on the following screen *
I have forgotten my password or memorable word
Log in

Figure 1: portal login page

Enter your email address, password and memorable word characters requested and click the *Log in* button in order to proceed. Alternatively, click on the "*I have forgotten my password or memorable word"* link in order to reset your forgotten details.

4 FORGOTTEN CREDENTIALS

If you have forgotten your password or memorable word, clicking on the "*I have forgotten my password or memorable word"* link via the Login page will generate an email to your specified account.

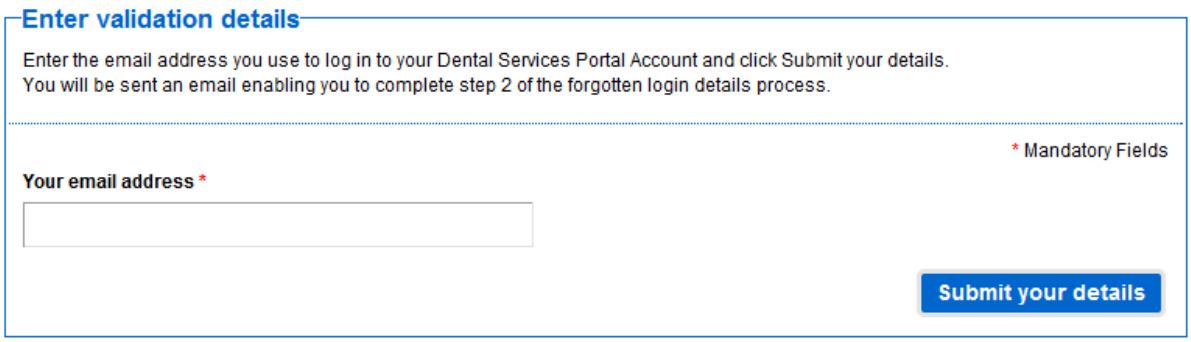

Enter validation details
Enter the email address you use to log in to your Dental Services Portal Account and click Submit your details.
You will be sent an email enabling you to complete step 2 of the forgotten login details process.
* Mandatory Fields
Your email address *
Submit your details

Figure 2: forgotten password page

Once received, the email will contain a link to the Reset Login Details page. Click on the link (or paste it into your internet browser navigation bar) to open up the page [Figure 3].

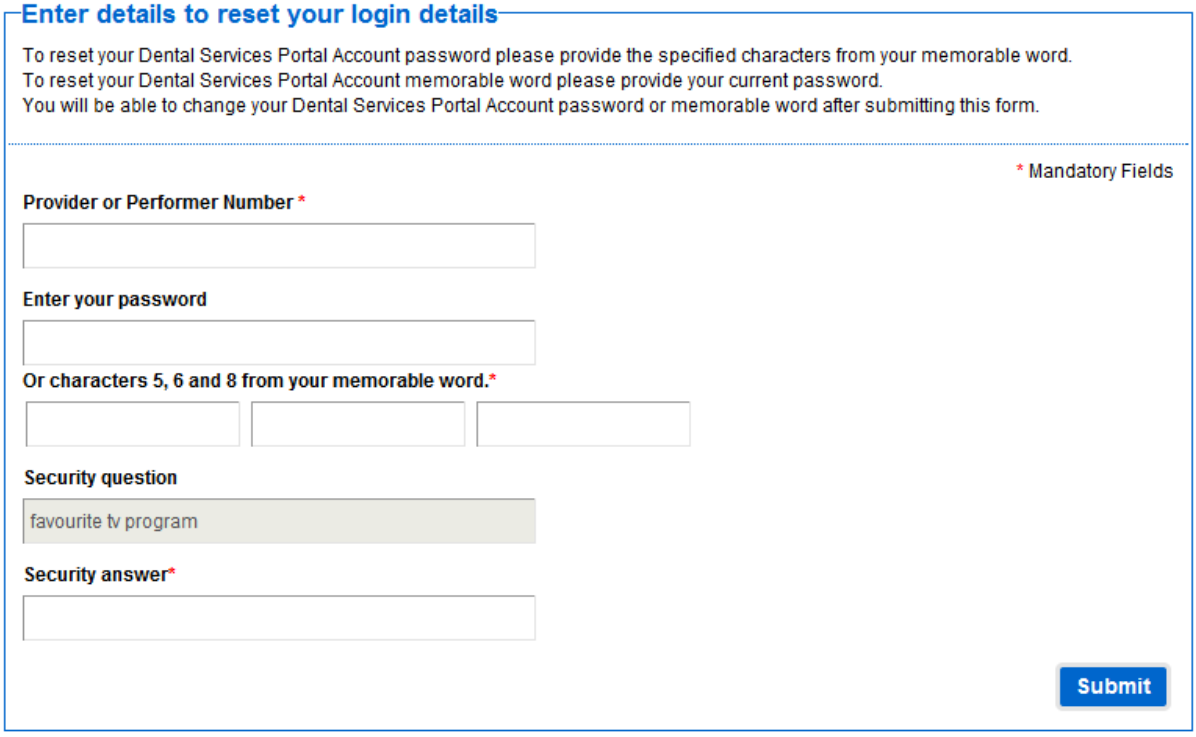

Enter details to reset your login details
To reset your Dental Services Portal Account password please provide the specified characters from your memorable word.
To reset your Dental Services Portal Account memorable word please provide your current password.
You will be able to change your Dental Services Portal Account password or memorable word after submitting this form.
* Mandatory Fields
Provider or Performer Number *
Enter your password
Or characters 5, 6 and 8 from your memorable word.*
Security question
favourite tv program
Security answer*
Submit

Figure 3: reset login details page

Fill out the required fields with your provider/performer number, your security answer and –

- your password (if you have forgotten your memorable word) **or**
- your memorable word characters (if you have forgotten your password).

If you have forgotten your security question or your email address you will need to contact the NHS Dental Services helpdesk for further assistance via http://www.nhsbsa.nhs.uk/DentalServices.aspx.

If you enter your provider/performer number, password and **security answer** correctly then the next page will enable you to update your **memorable word** credentials. Once you have entered and confirmed your new memorable word you will be redirected to the login page to confirm your login details once more. Having entered them correctly you will be allowed access to the Home page.

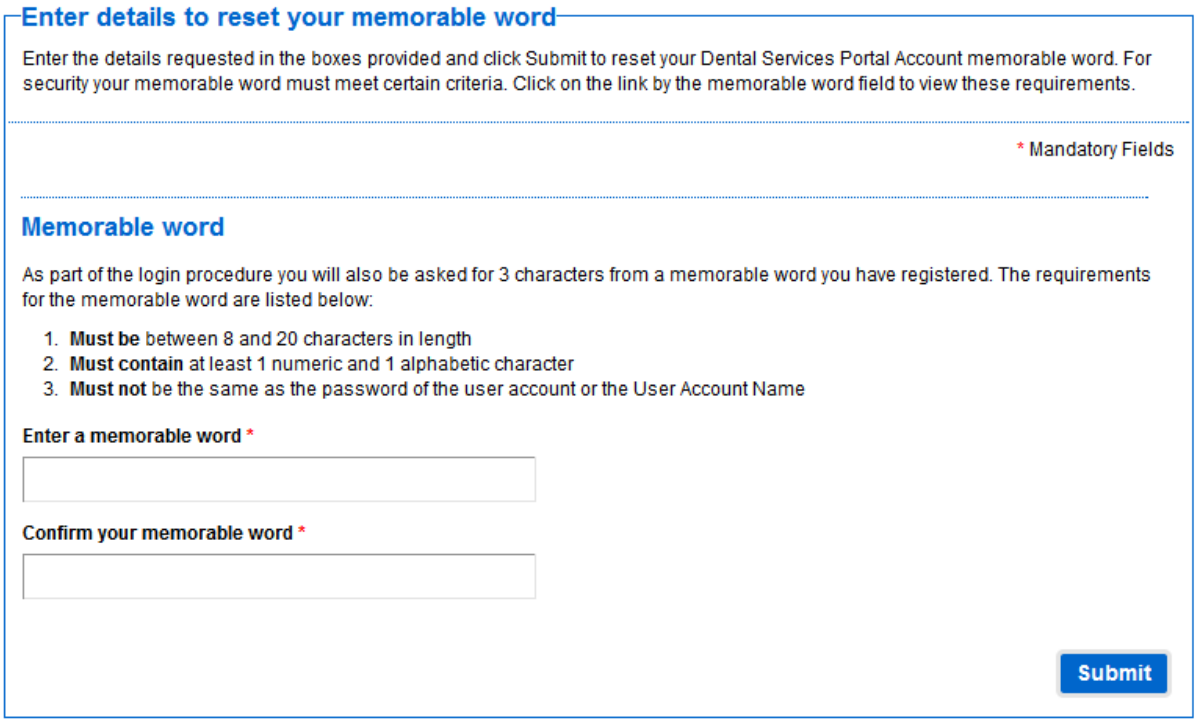

Enter details to reset your memorable word
Enter the details requested in the boxes provided and click Submit to reset your Dental Services Portal Account memorable word. For security your memorable word must meet certain criteria. Click on the link by the memorable word field to view these requirements.
* Mandatory Fields
Memorable word
As part of the login procedure you will also be asked for 3 characters from a memorable word you have registered. The requirements for the memorable word are listed below:
1. Must be between 8 and 20 characters in length
2. Must contain at least 1 numeric and 1 alphabetic character
3. Must not be the same as the password of the user account or the User Account Name
Enter a memorable word *
Confirm your memorable word *
Submit

Figure 4: change memorable word page

If you enter your provider/performer number, password and **memorable word** correctly then the next page will enable you to update your **password** credentials.

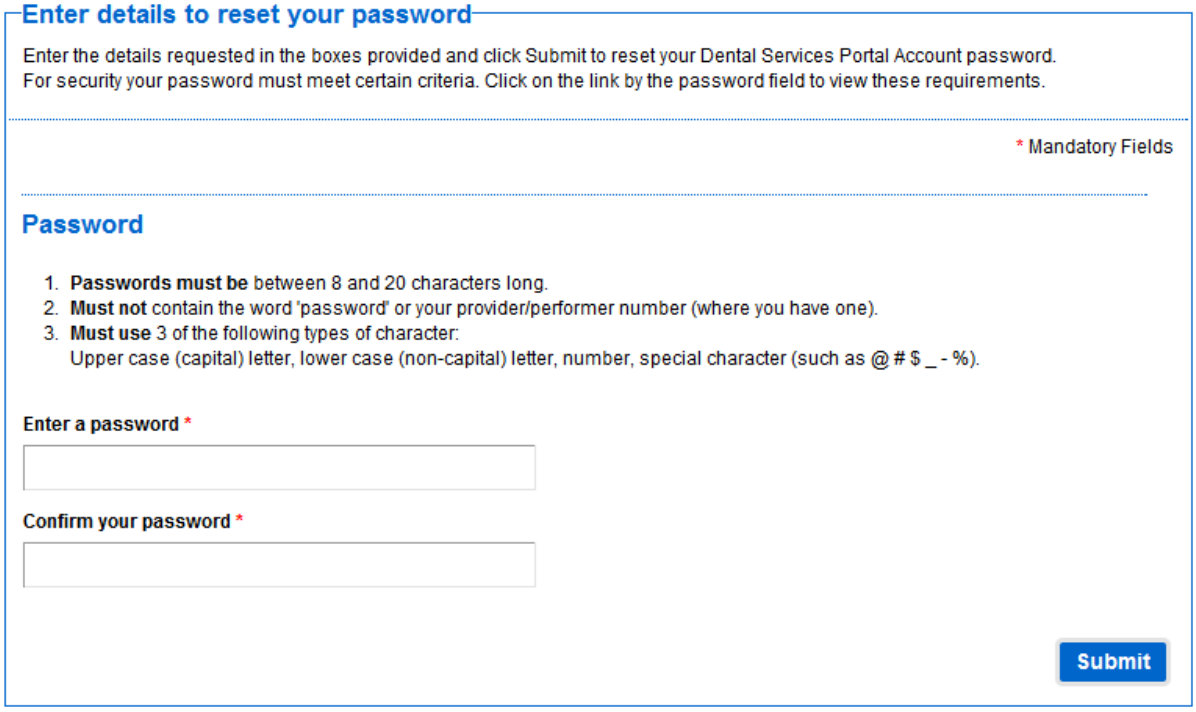

Enter details to reset your password
Enter the details requested in the boxes provided and click Submit to reset your Dental Services Portal Account password.
For security your password must meet certain criteria. Click on the link by the password field to view these requirements.
* Mandatory Fields
Password
1. Passwords must be between 8 and 20 characters long.
2. Must not contain the word 'password' or your provider/performer number (where you have one).
3. Must use 3 of the following types of character:
Upper case (capital) letter, lower case (non-capital) letter, number, special character (such as @ # $ _ - %).
Enter a password *
Confirm your password *
Submit

Figure 5: reset password page

Once you have entered and confirmed your new password you will be redirected to the login page to confirm your login details once more. Having entered them correctly you will be allowed access to the Home page.

After logging in, you may logout of the portal at any time by clicking on the Log Out link in the top left-hand corner of the page [Figure 6]. Please remember to close your internet browser after you do so.

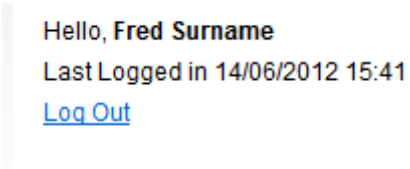


Figure 6: logout button

5 HOME

Having successfully logged into the portal you will be directed to the home page [Figure 7], tailored to the specific requirements of your role i.e. provider, performer or provider/performer

- Navigation Links – click to navigate to the desired portal functionality.
- System Messages – announcements and information from the BSA. Users may see some variation in the messages displayed depending on various criteria including role, geography, commissioning body and other factors.
- Quick-start links - click to navigate to the desired portal functionality. Users may see some variation in quick-start links displayed depending upon role.

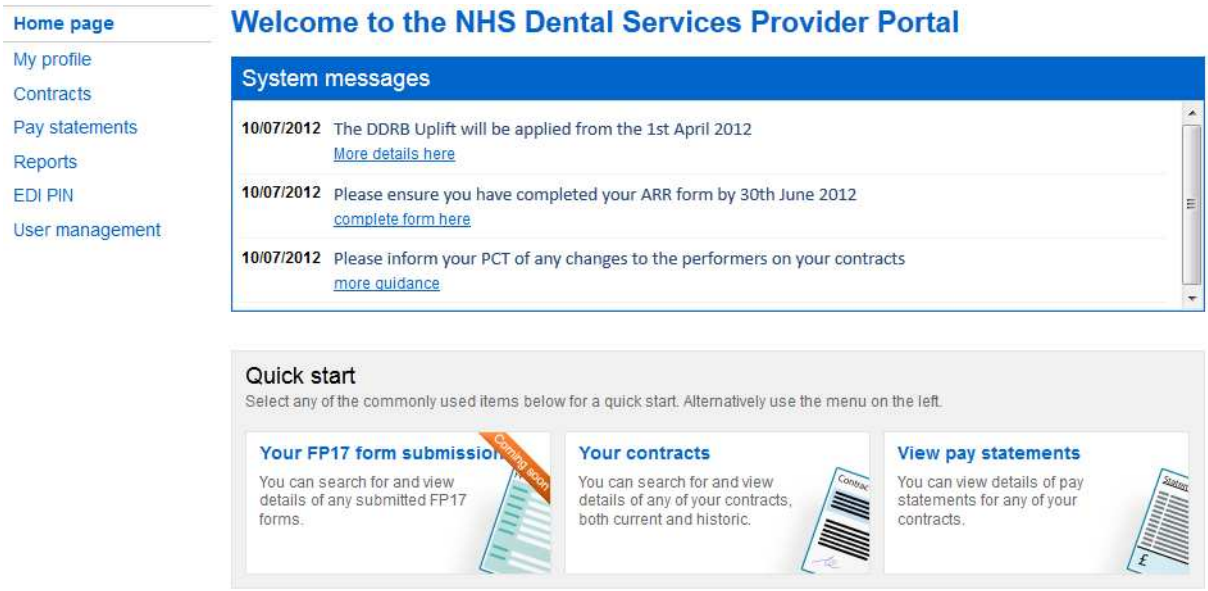

Home page
My profile
Contracts
Pay statements
Reports
EDI PIN
User management
Welcome to the NHS Dental Services Provider Portal
System messages
10/07/2012 The DDRB Uplift will be applied from the 1st April 2012
More details here
10/07/2012 Please ensure you have completed your ARR form by 30th June 2012
complete form here
10/07/2012 Please inform your PCT of any changes to the performers on your contracts
more guidance
Quick start
Select any of the commonly used items below for a quick start. Alternatively use the menu on the left.
Your FP17 form submission
Coming soon
You can search for and view details of any submitted FP17 forms.
Your contracts
You can search for and view details of any of your contracts, both current and historic.
View pay statements
You can view details of pay statements for any of your contracts.

Figure 7: provider home page

6 MY PROFILE

The My Profile page [Figure 8] enables you to update your personal contact details and login/security credentials, with options to:

- Change your email address
- Change your correspondence address
- Change your contact telephone number
- Change your password

- Change your memorable word
- Change your security question and answer

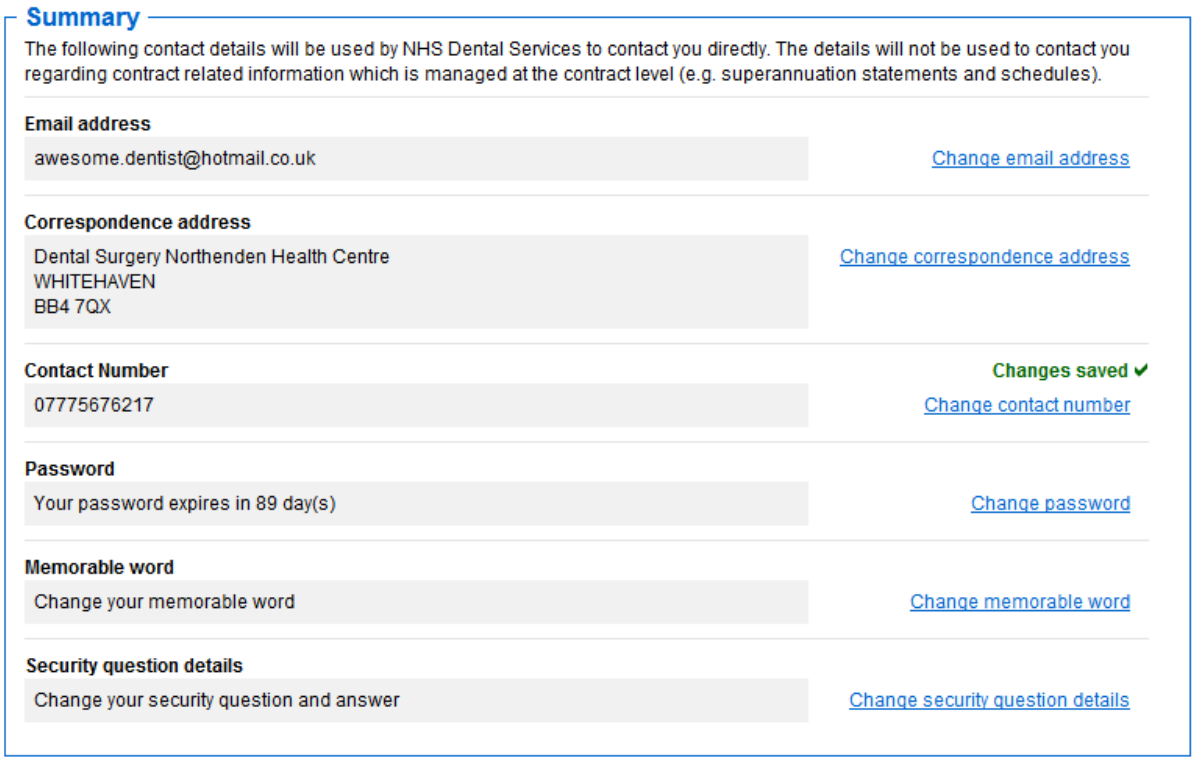

Summary
The following contact details will be used by NHS Dental Services to contact you directly. The details will not be used to contact you regarding contract related information which is managed at the contract level (e.g. superannuation statements and schedules).
Email address
awesome.dentist@hotmail.co.uk
Change email address
Correspondence address
Dental Surgery Northenden Health Centre
WHITEHAVEN
BB4 7QX
Change correspondence address
Contact Number
Changes saved
07775676217
Change contact number
Password
Your password expires in 89 day(s)
Change password
Memorable word
Change your memorable word
Change memorable word
Security question details
Change your security question and answer
Change security question details

Figure 8: my profile page

All actions on this page follow more or less the same basic steps, namely being:

1. Click on the item to be changed
2. Enter the new item values (e.g. new telephone number)
3. Click *Save changes*
4. Confirm your current password
5. Click on *Proceed* to save the changes
6. *Optionally you may quit the change at any time by clicking on the Cancel button*

Some things you should be aware of:

- *If you change your email address, you will **never** be able to revert to the previous email. Please think very carefully before you go ahead with this action since it is irrevocable.*
- *Your correspondence address can be searched for by postcode and selected from a list of results or entered manually. Whichever method you choose, the Title field is mandatory.*
- *Your security credentials (password, memorable word, security question details) must follow the on-screen requirements and should not be shared with anyone.*

7 CONTRACTS

Clicking on the Contracts button will immediately open the current contracts page. Options to search for contracts via the find contracts page or update contract bank details via the manage bank details page are also made available.

7.1 Current Contracts

Current contract listing

This table is a summary of all your current contracts. Blue underlined items can be selected to view more detailed information.
Note that all activity information displayed in this table relates to the previous financial year 2010/11 and not the current financial year.
The next release of the portal will display current financial year data and the ability to view historic activity for the previous 24 months.

Showing 1-5 of 5 items

Contract number	Provider	Contract value	UDA		UOA	
			Contracted	Processing	Contracted	Processing
(5N3) 243779 0001	MISS SC Wilson	£783,363.32	26,556.00	-	0.00	-
(5N3) 243779 0002	MISS SC Wilson	£0.00	0.00	-	0.00	-
(5N3) 243779 0003	MISS SC Wilson	£323,558.05	12,000.00	-	0.00	-
(5N3) 243779 0004	MISS SC Wilson	£240,000.00	8,500.00	-	0.00	-
(5N3) 243779 0005	MISS SC Wilson	£376,322.99	15,309.00	-	0.00	-

Showing 1-5 of 5 items

1-5

Figure 9: current contracts (provider view)

Depending on whether you are a provider [Figure 9: current contracts (provider view)Figure 9] or a performer [Figure 11] you may see a slightly different view:

- **Both** Contract number
    - The unique contract reference, made up of the PCT/Commissioner/PDS/SHA organisation code, the provider number and the contract iteration [tag].
- **Both** Provider
    - The name of the contract provider.
- **Provider** Contract value
    - The total contract value for the current financial year.
- **Provider** UDA contracted
    - The Units of Dental Activity contracted for the current financial year.
- **Provider** UDA processing
    - The Units of Dental Activity to-date for the current financial year. (value not available till Sep 2012)
- **Provider** UOA contracted
    - The Units of Orthodontic Activity contracted for the current financial year.
- **Provider** UOA processing

    - The Units of Orthodontic Activity to-date for the current financial year. (value not available till Sep 2012)
- **Performer** UDA pre-scheduled
    - The Units of Dental Activity to-date for the current financial year. (value not available till Sep 2012)
- **Performer** UOA pre-scheduled
    - The Units of Orthodontic Activity to-date for the current financial year. (value not available till Sep 2012)
- **Performer** contracted allocation
    - The performer allocation for the contract
- **Performer** superannuation amount.
    - The performer superannuation amount for the contract.

If you are a provider-performer (logged in as a provider - by default), you may change to the performer view by clicking on the *Switch to performer* link [Figure 10]. When viewing pages as a performer, you can switch back by clicking on the *Switch to provider* link.

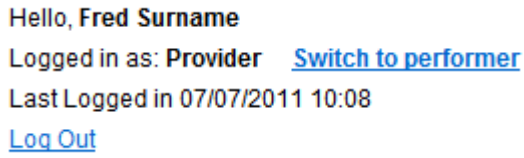
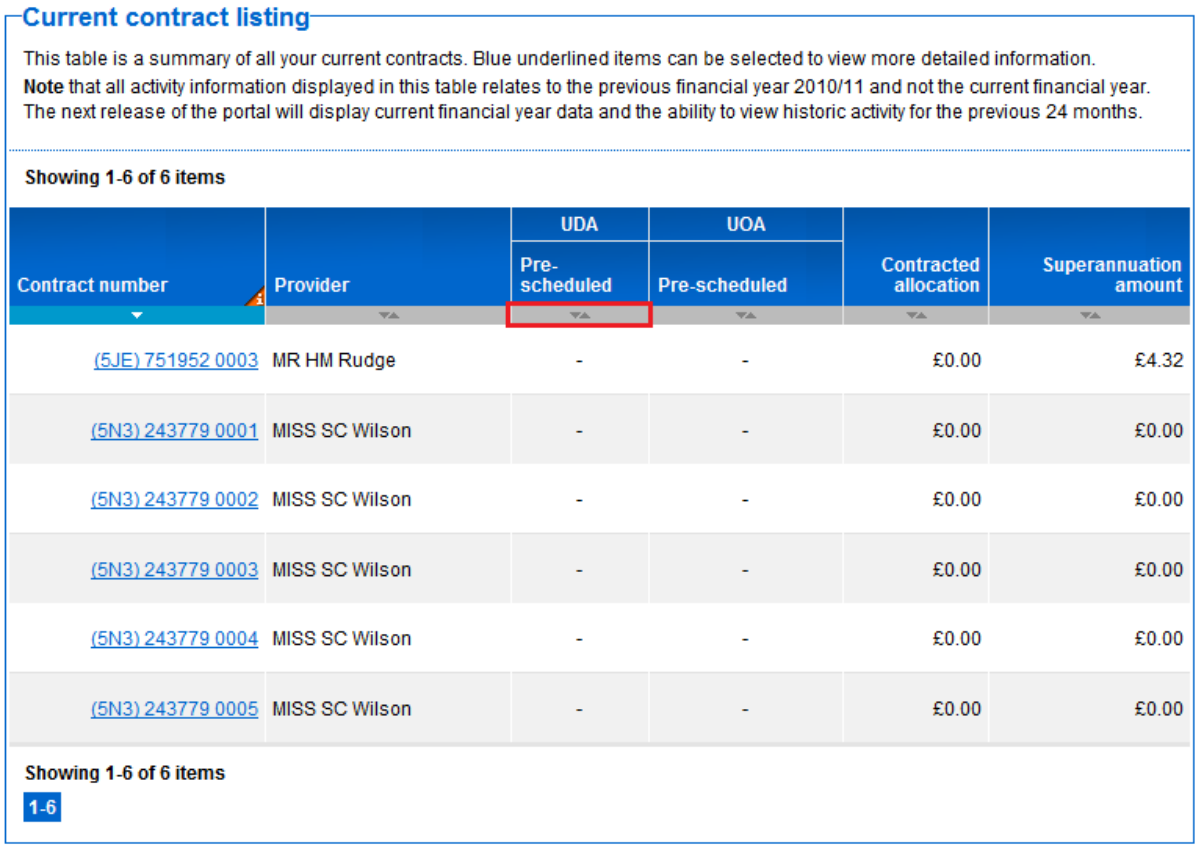


Figure 10: change to performer or provider view here

Each column can be sorted into alphabetic or numeric order (depending on the column data) by clicking on the filter button below the column header (highlighted in red - Figure 11).



Current contract listing

This table is a summary of all your current contracts. Blue underlined items can be selected to view more detailed information.
Note that all activity information displayed in this table relates to the previous financial year 2010/11 and not the current financial year.
The next release of the portal will display current financial year data and the ability to view historic activity for the previous 24 months.

Showing 1-6 of 6 items

Contract number	Provider	UDA	UOA	Contracted allocation	Superannuation amount
		Pre-scheduled	Pre-scheduled		
(5JE) 751952 0003	MR HM Rudge	-	-	£0.00	£4.32
(5N3) 243779 0001	MISS SC Wilson	-	-	£0.00	£0.00
(5N3) 243779 0002	MISS SC Wilson	-	-	£0.00	£0.00
(5N3) 243779 0003	MISS SC Wilson	-	-	£0.00	£0.00
(5N3) 243779 0004	MISS SC Wilson	-	-	£0.00	£0.00
(5N3) 243779 0005	MISS SC Wilson	-	-	£0.00	£0.00

Showing 1-6 of 6 items

1-6

Figure 11: current contracts (performer view)

Clicking on the Contract number link will open up the contract details page.

7.2 Contract Details – Provider view

As with the current contracts view, the information available in the contract details page(s) will vary depending on whether you are a provider or a performer, or a provider-performer in provider/performer view – see above.

Clicking on the contract number as a **provider** opens the provider details page initially with several further pages enabling you to drill down further into contract information:

- Contract other addresses
- Contractual summary
- Performers on this contract

We'll go through each page in turn. All information on these pages is read only.

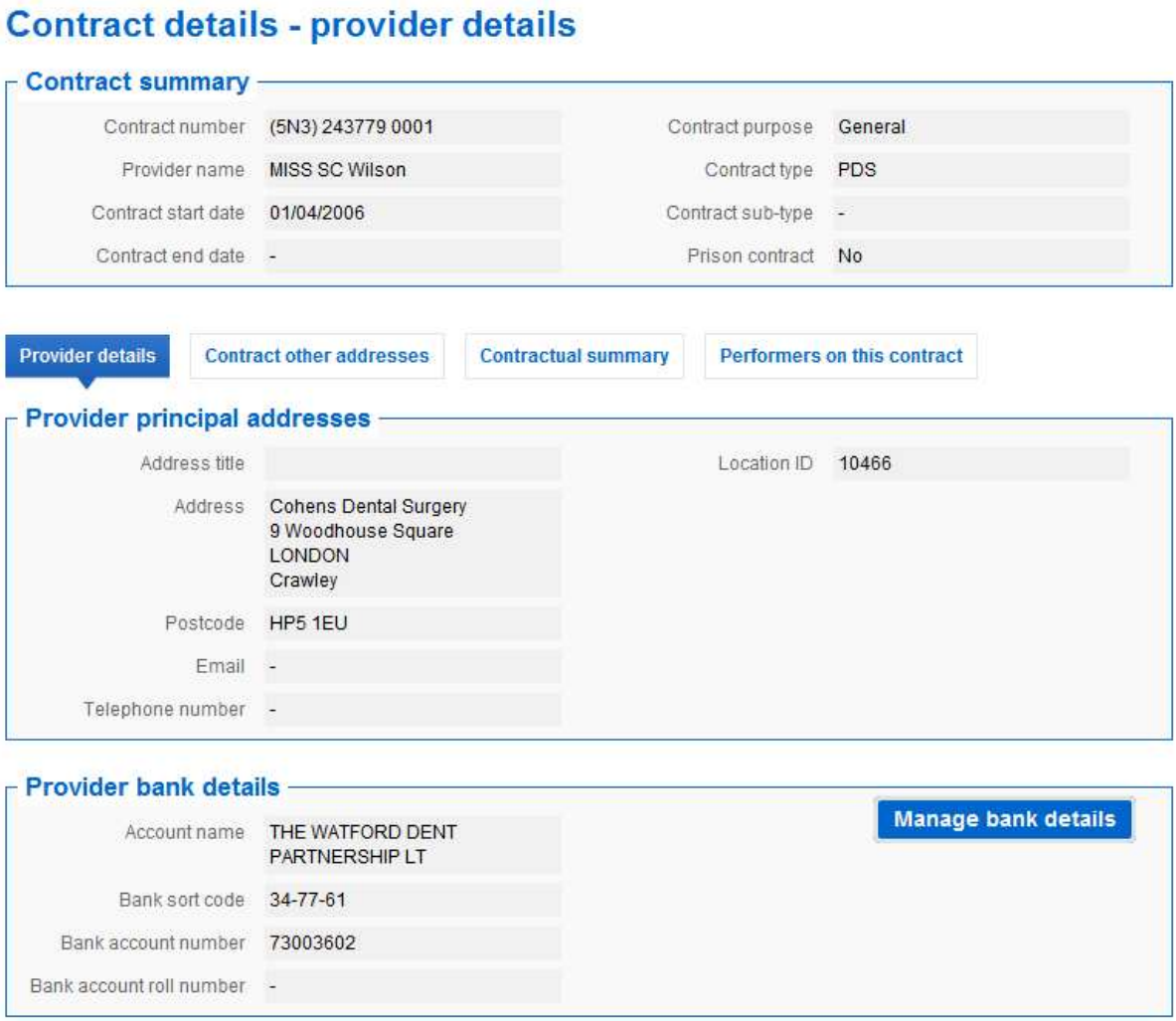


Figure 12: provider contract details

- Contract summary
    - Contract number
        - The unique contract reference, made up of the commissioning organisation code, the provider number and the contract iteration [tag].
    - Provider name
        - The name of the contract provider.
    - Contract start date
        - The date on which the contract started.
    - Contract end date
        - The date on which the contract ended. If it is a current contract the end date field may not be populated.
    - Contract purpose
        - The intended remit of the contract. General, orthodontic or both.
    - Contract type & [Contract sub-type]
        - The type of contract. GDS, GDS [Pilot], PDS, PDS [Plus], PDS [Pilot], Trust, Trust [Plus].
    - Prison contract

- Indicates whether the contract is for a prison(s) with a Yes or No.

The providers address and bank details are also displayed on the initial contract details page. The contents should be self explanatory. Note that the Provider bank details section contains a Manage bank details button however. Clicking on this button will open the Manage bank details page, which we'll cover in section 7.5 below.

Clicking on the Contract other addresses button opens up the Provider other addresses view. Obviously where there are no additional addresses the table will be empty. The columns can be re-ordered where necessary by clicking on the filter button.

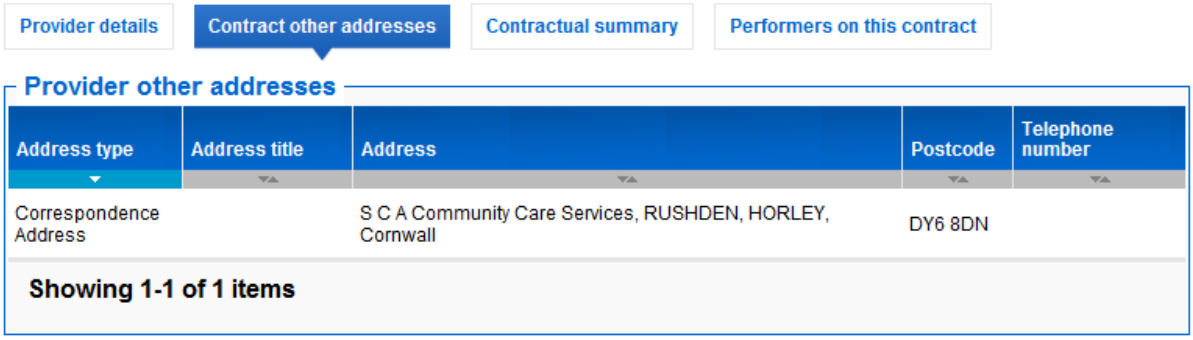


Figure 13: provider other addresses

Clicking on the Contractual summary button opens up the Contractual details view containing figures for each year (or period) during the contracts previous history:

- Date from
  - Date contractual details start from.
- Date to
  - Date contractual details end on. (The date may not be present if an end date hasn't been specified).
- Contracted value
  - Contracted value for the from and to dates on the applicable row.
- Contracted UDA
  - Contracted UDA for the from and to dates on the applicable row.
- Contracted UOA
  - Contracted UOA for the from and to dates on the applicable row.
- Contracted Dom visits
  - Contracted number of courses of treatments for domiciliary visits for the from and to dates on the applicable row.
- Contracted sedations
  - Contracted number of courses of treatments for patient sedations for the from and to dates on the applicable row.

Again columns can be re-ordered as required.

Provider details | Contract other addresses | Contractual summary | Performers on this contract

Contractual details

Date from	Date to	Contracted value	Contracted UDA	Contracted UOA	Contracted Dom visits	Contracted sedations
01/04/2010	-	£783,363.32	26,556	0	0	0
01/04/2009	31/03/2010	£776,375.94	26,556	0	0	0
01/04/2008	31/03/2009	£774,748.97	26,556	0	0	0
01/11/2007	31/03/2008	£749,273.67	26,556	0	0	0
01/04/2007	31/10/2007	£747,561.75	26,556	0	0	0
01/04/2006	31/03/2007	£727,447.82	26,556	0	0	0

Showing 1-6 of 6 items

1-6

Figure 14: provider contractual details

Clicking on the Performers on this contract button opens up the List of performers associated with the contract.

Provider details | Contract other addresses | Contractual summary | Performers on this contract

List of performers on this contract

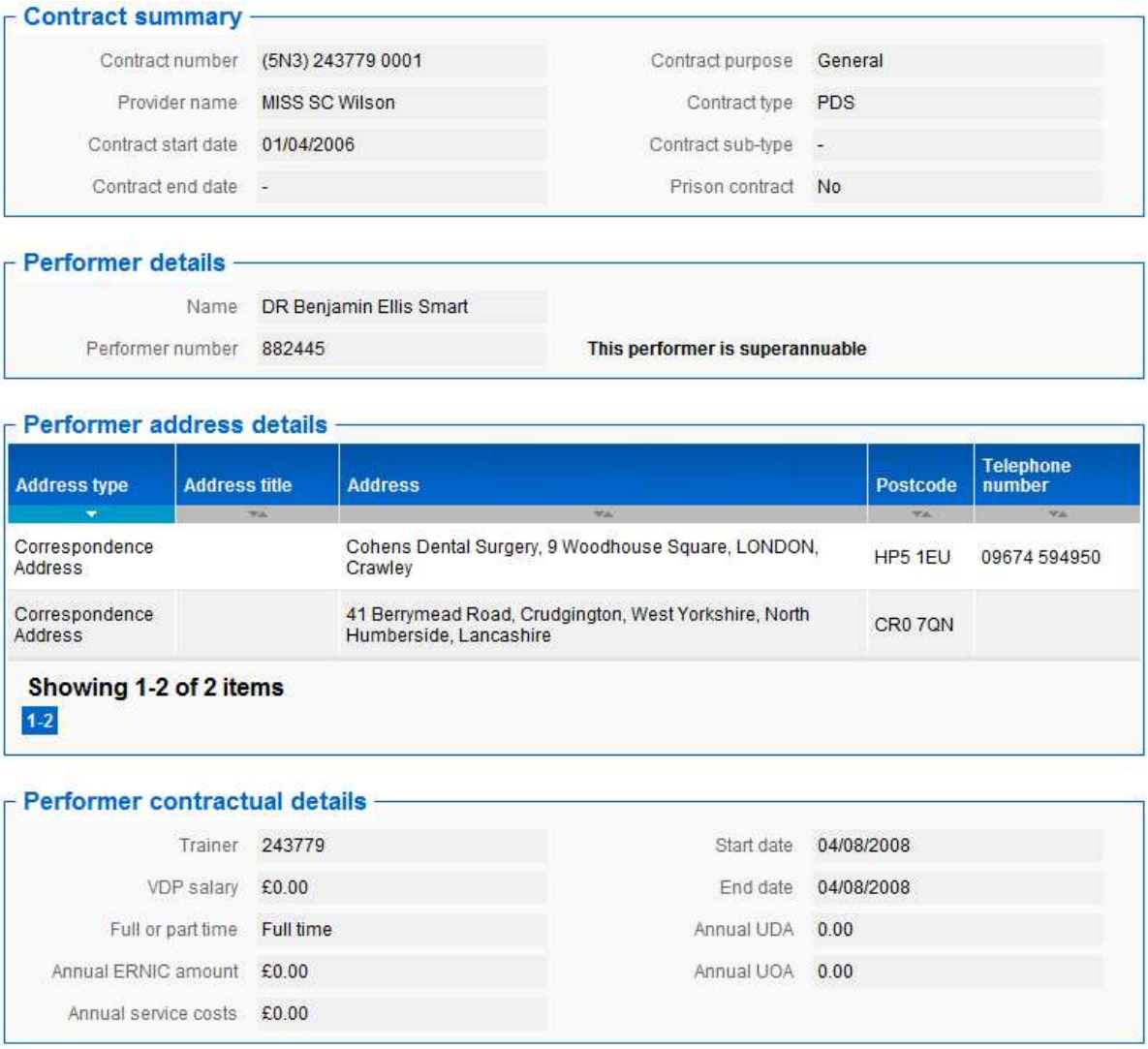
Performer name	Performer number	Start date	End date	VDP	Status
MR Anthony Joseph Palliser	280992	10/08/2009	-	-	Current
DR Benjamin Ellis Smart	882445	04/08/2008	04/08/2008	Full time	Historic
MISS Fersai Butwick	991309	16/08/2010	-	-	Current
MISS Fersai Butwick	991309	03/08/2009	03/08/2009	Full time	Historic
MR Frederek Charles Haining	959545	01/04/2006	06/04/2009	-	Historic
MRS Jane Carolyn Cobley	881031	02/08/2008	-	-	Current
MRS Jennifer Anne Singh	357235	17/02/2010	-	-	Current
MS Rosemary Elizabeth Mulcahy	866792	01/04/2006	-	-	Current
MISS Suzi Catherine Wilson	243779	01/04/2006	-	-	Current

Showing 1-9 of 9 items

1-9

Figure 15: performers on the contract

The columns are self explanatory. You can drill down into further performer information by clicking on the Performer name link.



Contract summary

Contract number	(5N3) 243779 0001	Contract purpose	General
Provider name	MISS SC Wilson	Contract type	PDS
Contract start date	01/04/2006	Contract sub-type	-
Contract end date	-	Prison contract	No

Performer details

Name	DR Benjamin Ellis Smart	
Performer number	882445	**This performer is superannuable**

Performer address details

Address type	Address title	Address	Postcode	Telephone number
Correspondence Address		Cohens Dental Surgery, 9 Woodhouse Square, LONDON, Crawley	HP5 1EU	09674 594950
Correspondence Address		41 Berrymead Road, Crudgington, West Yorkshire, North Humberside, Lancashire	CR0 7QN	

Showing 1-2 of 2 items

1-2

Performer contractual details

Trainer	243779	Start date	04/08/2008
VDP salary	£0.00	End date	04/08/2008
Full or part time	Full time	Annual UDA	0.00
Annual ERNIC amount	£0.00	Annual UOA	0.00
Annual service costs	£0.00		

Figure 16: performer details

This page [Figure 16] details various items relating to the performer:

- Performer Details
    - Name
    - Performer number
    - Message
        - *This performer is superannuable*.
        - *This performer is eligible for seniority*.
- Performer address details
    - Details of addresses associated with the performer on the contract. Personal address for the performer can be found within 'my profile'.
- Performer contractual details
    - May contain more or less items depending on relevance to specific performer.
    - Message

        - *There will be no contributions to the NHS Pension scheme and no life insurance can be paid if Annual Net Pensionable Earnings does not have an amount.*
            - Displayed if the performer **is** superannuable but the net pensionable amount is zero.
    - *To comply with the NHS Pension scheme requirements the Annual Contracted Allocation must be completed to ensure the correct calculation of the Net Pensionable Earnings for the contract.*
        - Displayed if the performer **is** superannuable but the allocated annual amount is zero.
    - Trainer
    - VDP salary
    - Annual gross allocation
    - Allocated annual amount – displayed in the event the allocated amount for the performer is > 0 and the performer **is** superannuable.
    - Annual allocation
        - Displayed if the performer **is not** superannuable.
    - Annual net pensionable earnings
        - Displayed if the performer **is** superannuable.
    - Annual ERNIC amount
    - Annual Grant amount
    - Annual service costs
    - Start date
    - VDP contractual earnings start date for contract.
    - End date
    - VDP contractual earnings end date for contract.

Clicking on the *internet browser* back button at this point will take you back to the list of performers for further scrutiny. Alternatively you can use the navigation links to open up another view, e.g. the find contracts page [section 7.4].

7.3 Contract Details – Performer View

Clicking on the contract number as a **performer** directs you straight to the performer details view described in section 7.2 above.

7.4 Find Contracts

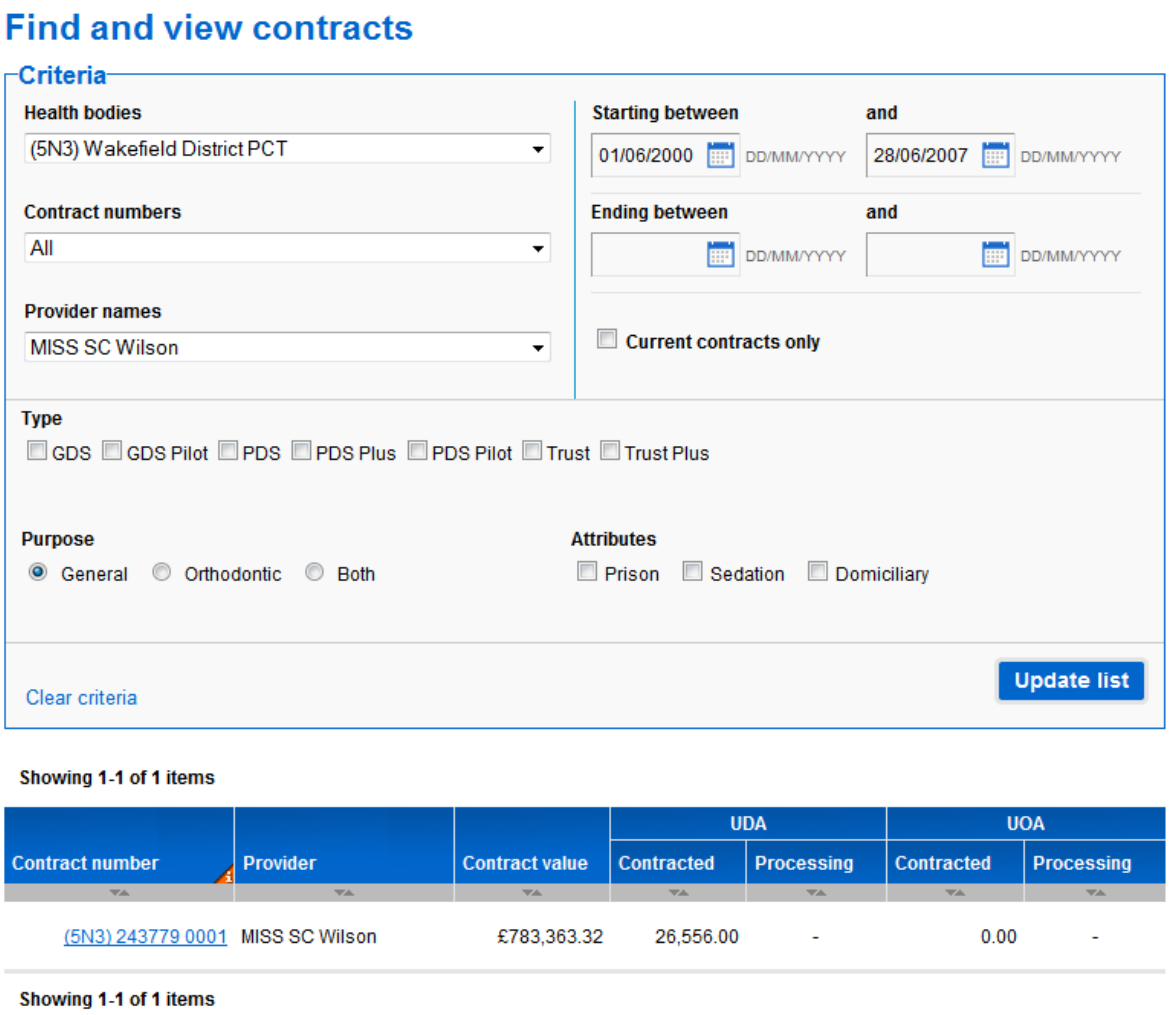


Figure 17: find contracts

Opening the find contracts view presents you with a number of options with which to locate both current and historic contracts using various criteria. Only those contracts that have been opened since 1st April 2006 are available to view within the portal. We'll run through the options below:

- Health Bodies
    - Restrict search to a single health body by selecting one from the drop down list and then clicking the *Update list* button.
- Contract Numbers
    - Restrict search to a single contract number.
- Provider names
    - Restrict search to a single provider.
- Starting between
    - Refine the contract *start* dates between which you would like to search – e.g. selecting dates *starting between* 01/06/2006 *and* 28/06/2010 will return contracts that *started* on or between the two selected dates.
- Ending between
    - Refine the contract *end* dates between which you would like to search – e.g. selecting dates *ending between* 01/09/2008 *and* 28/02/2011 will return contracts that *ended* on or between the two selected dates.

- Current contracts only
    - Restrict the search to current contracts only.
- Type
    - Restrict the search to specified contract types.
- Purpose
    - Restrict the search to contracts with the specified purpose. Warning! Clicking *Both* here will only return contracts that are both general **and** orthodontic, not contracts that are general **or** orthodontic.
- Attributes
    - Restrict the search to contracts of the specified attributes.

The search filters can also be combined to restrict the search further, e.g. as in the screenshot [Figure 17] selecting the Health body, Provider names, Purpose and Starting between criteria sufficiently restricts the search parameters to only return a single contract result.

Clicking the Clear criteria button will reset all search filters.

Please note also that the columns displayed in the results table will depend on whether you are viewing the page as a provider or a performer. Section 7.1 refers.

7.5 Manage Bank Details

Before making any changes to your bank details, you *must* answer the important information questions in [Figure 18Figure 1] below.

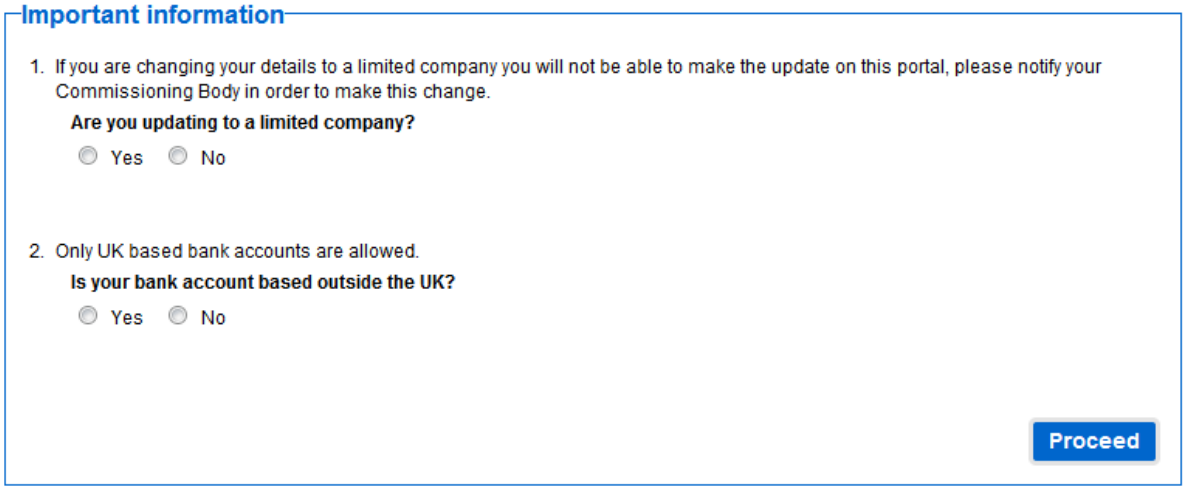

Important information
1. If you are changing your details to a limited company you will not be able to make the update on this portal, please notify your Commissioning Body in order to make this change.
Are you updating to a limited company?
Yes
No
2. Only UK based bank accounts are allowed.
Is your bank account based outside the UK?
Yes
No
Proceed

Figure 18: manage bank details important questions

Once you have confirmed that you are *not* changing your bank details to a limited company account, and that your bank account resides within the UK – only then will you be able to proceed and make changes to your bank details.

If you are changing to a limited company account or, if your account *is* based outside of the UK – please contact your commissioning body regarding the change.

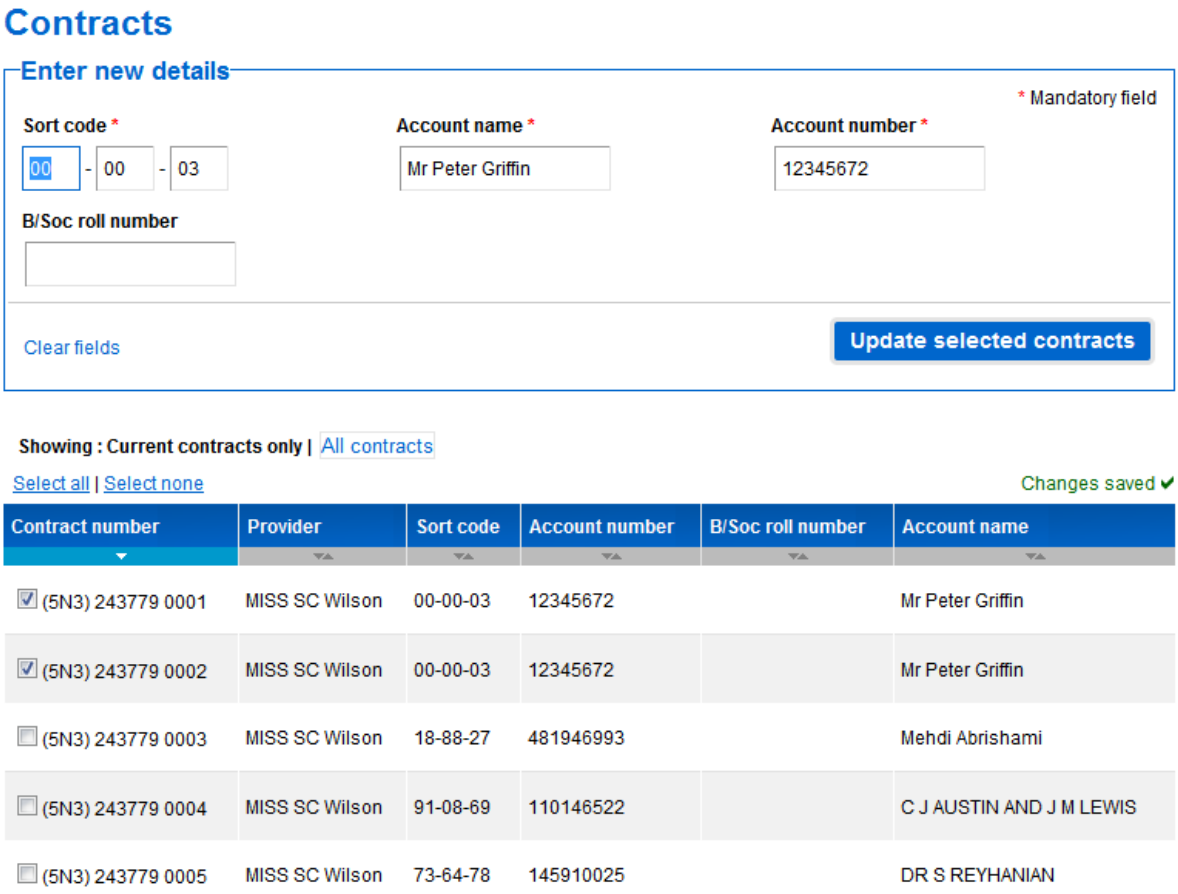

Contracts
Enter new details
* Mandatory field
Sort code *
00 - 00 - 03
Account name *
Mr Peter Griffin
Account number *
12345672
B/Soc roll number
Clear fields
Update selected contracts
Showing : Current contracts only | All contracts
Select all | Select none
Changes saved
Contract number
Provider
Sort code
Account number
B/Soc roll number
Account name
(5N3) 243779 0001 MISS SC Wilson 00-00-03 12345672 Mr Peter Griffin
(5N3) 243779 0002 MISS SC Wilson 00-00-03 12345672 Mr Peter Griffin
(5N3) 243779 0003 MISS SC Wilson 18-88-27 481946993 Mehdi Abrishami
(5N3) 243779 0004 MISS SC Wilson 91-08-69 110146522 C J AUSTIN AND J M LEWIS
(5N3) 243779 0005 MISS SC Wilson 73-64-78 145910025 DR S REYHANIAN

Figure 19: manage bank details view

Once on the manage bank details view, you may proceed and update one or many contracts with valid bank details:

1. Select the contract you wish to update by checking the checkbox(es).
    - Use the *Select all* or *Select none* button to check all or none of the contract checkboxes.
    - Use the *Current contracts only* or *All contracts* link to toggle the display between *current* and *all* contracts.
2. Enter your valid bank sort code – 6 digits.
3. Enter the account name.
4. Enter your valid bank account number – 8 digits.
5. Enter the roll number if necessary.
6. Click on the *Update selected contracts* button.
7. Confirm identify and authority to change by validating your password.
8. Confirm that you definitely want to go ahead and change the bank details (or not) by clicking *Yes* (or *No*) on the pop-up.

If validation of your account details fails (see steps 2-5), the update will fail with an error message indicating what the problem is.

8 PAY STATEMENTS

The Pay statements view enables performer and provider users to search for and download Pay statements. When selecting a contract from the list and clicking on the *Show details* button, a list of the available pay statements are displayed for the highlighted financial year [Figure 20].
Clicking on the report *month* link in the Month column will spawn a new web internet browser window with options to:

- Open
    - Open the file for immediate viewing (additional software e.g. Adobe Reader may be required for this action).
- Download
    - Save the file to your PC (check your downloads folder or specify a location).
- Cancel
    - Take no further action and exit the new window.

The pay statements list consists of three columns:

- Month
    - Identifies the month to which the pay statement pertains.
    - Opens download window in internet browser if clicked on.
- Pay statement & Schedule
    - Indicates type of pay statement - examples in table below:

Month	**Pay Statement**	**Schedule**	Description
March	*Yes*	*Yes*	Pay Statement
March	*Yes*	*No*	Copy Pay Statement
February	*Yes*	*Yes*	Cleared previous month pay statement
January	*No*	*Yes*	Schedule
December	*Yes*	*Yes*	Released payment statement
November	*Yes*	*No*	Extra payment statement

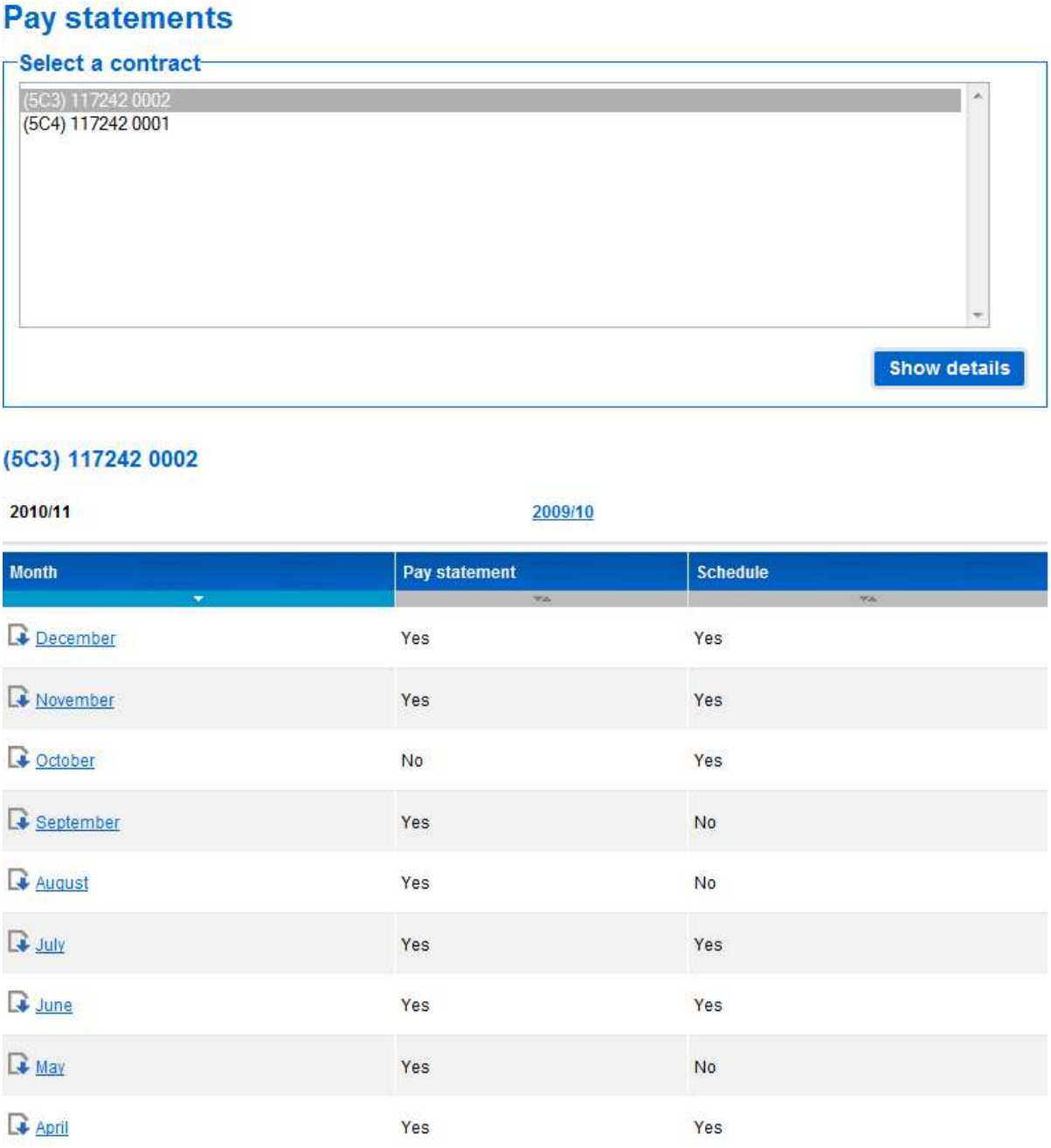


Figure 20: pay statements

The selected financial year can be changed by clicking on the year link (e.g. 2009/10 above), however the link will only appear **if** there are reports held for the year. If for example there are no reports held for 2009/10, for the contract selected – the financial year link will not be visible.

Equally, if a report is not available for e.g. January, this will not appear in the list – as per Figure 20.

9 REPORTS

The Reports page enables provider and performer users to search for and download reports or pension statements respectively.

9.1 Provider Reports

Navigating to the reports view as a provider (remember the performer-provider switch [Figure 10] if you need to change view) equips you with several search and filter mechanisms, listed below:

- Type
    - Filter search by report type –
    - Annual Activity Report
    - General Vital Signs
    - Orthodontic Vital Signs
- Within financial year
    - Filter search by financial year.
- Within financial period
    - Filter search by report period –
        - Monthly
        - Quarterly
        - Mid & Year end.
- Contract number
    - Filter search by contract.

Note: If there are no instances of a report type, year or period the checkbox filter will not appear for the associated filter mechanism (checkbox).

The filters can be combined in order to refine your search as per the example [Figure 21] below:

- Search filter = {Annual Activity Report, 2011-2012, (5C3) 117242 0002}

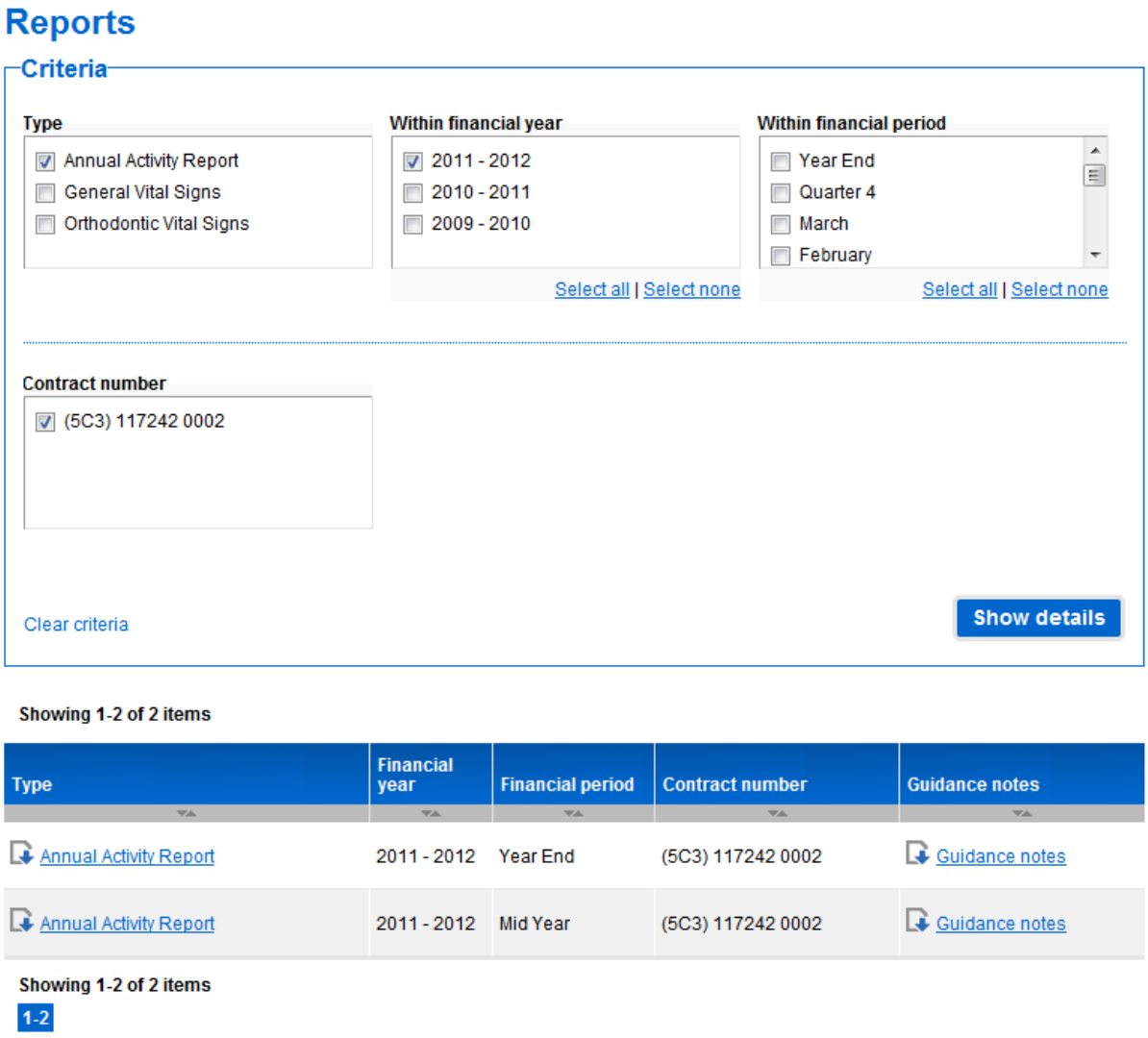


Figure 21: provider reports example

The *Select all* and *Select none* links can be used to check/uncheck all filter checkboxes as required. The *clear criteria* button wipes out any changes made so you can start again.

The results table consists of the following columns:

- Type
    - The type of report to be downloaded
    - Clicking on the report name opens the internet browser download window with options to Open, Download or Cancel.
- Financial year
    - The financial year to which the report refers.
- Financial period
    - The financial period to which the report refers.
- Contract number
    - The contract number to which the report refers.
- Guidance notes
    - Support notes for the report to be downloaded.

- Clicking on the Guidance notes link opens the internet browser download window with options to Open, Download or Cancel.

9.2 Performer Reports

When viewing reports as a performer, only the financial year can be used to filter the reports since only one type of report is available – the Personal Superannuation Statement, displayed by selecting one or more financial years and clicking the *Show details* button.

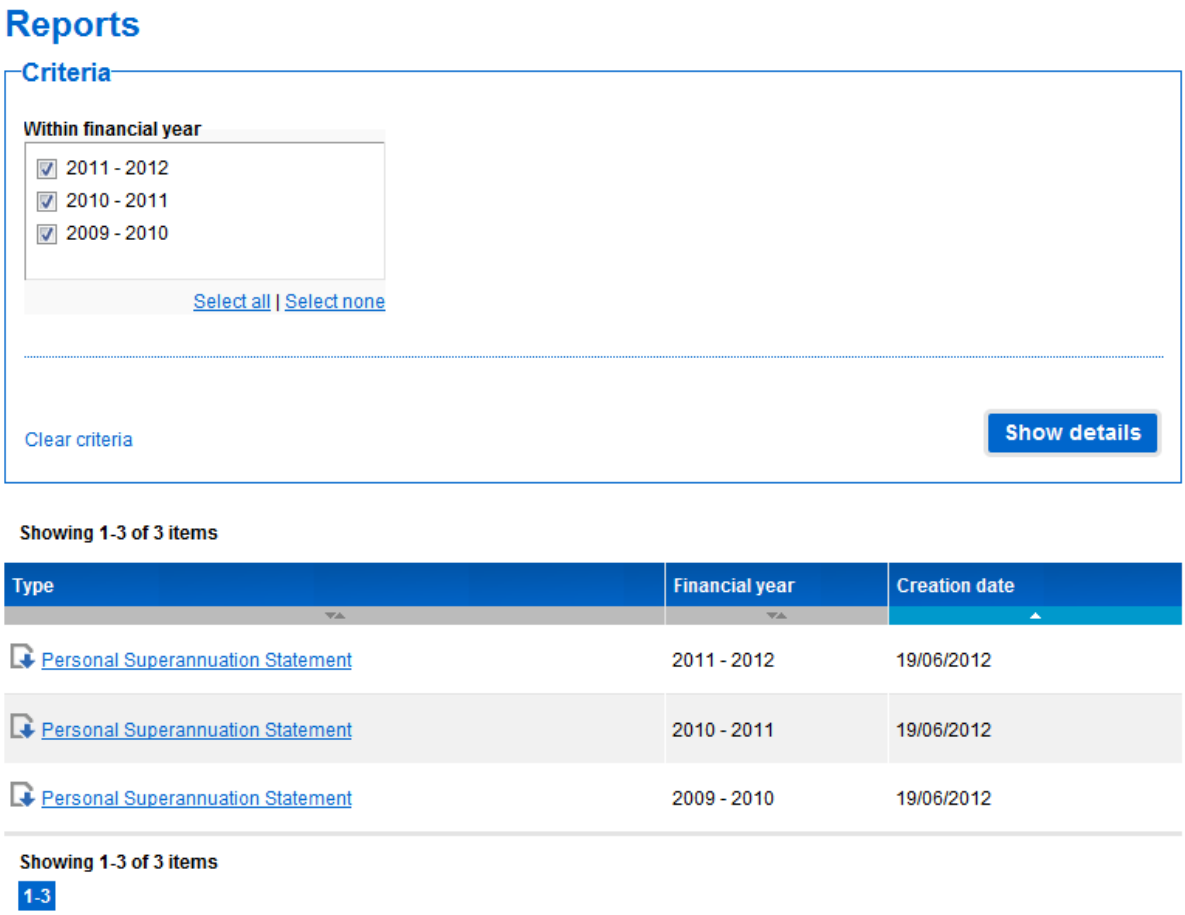


Figure 22: performer reports

The statements can be downloaded by clicking on the *Personal Superannuation Statement* link.

10 EDI PIN

Your EDI PIN or temporary EDI PIN can be requested via the EDI PIN page. Once again, the facilities available to you on this page will vary depending on whether you are a provider or a performer.

10.1 Provider EDI PIN

The EDI PIN page when viewed as a provider will enable you to request temporary EDI PINs for performers associated with your contracts. Their performer number and name is displayed along with a request EDI PIN link [Figure 23]. Before requesting an EDI Temporary PIN for one of your performers you will need to know the Site Number that they transmit from. The temporary PIN will allow you to submit outstanding claims for a performer who is no longer at the practice.

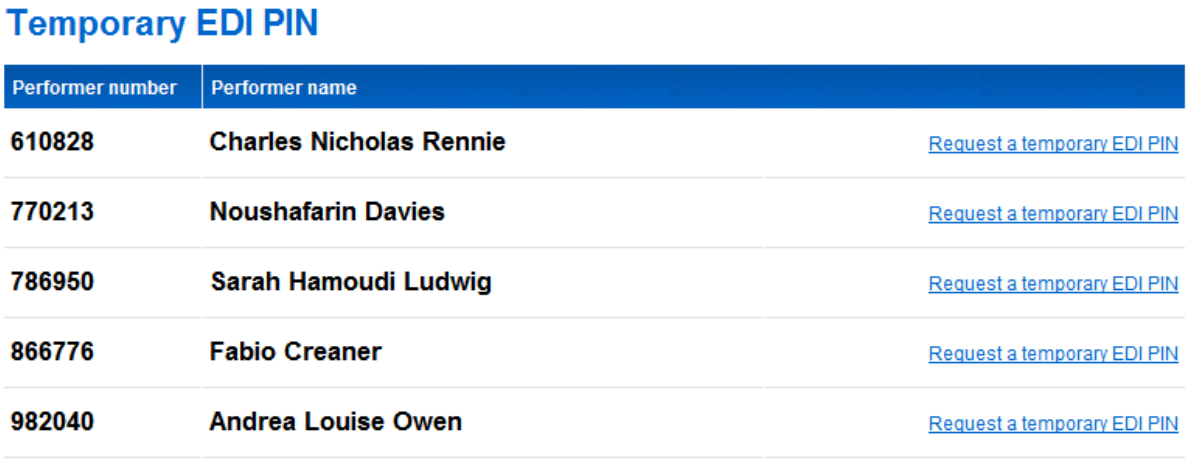


Figure 23: Provider request temporary EDI PIN for Performer initial page

Selecting a performer and then clicking on the *Request a temporary EDI PIN* link will open a new page [Figure 24] in which you may specify the site number for which the temporary EDI PIN is required.

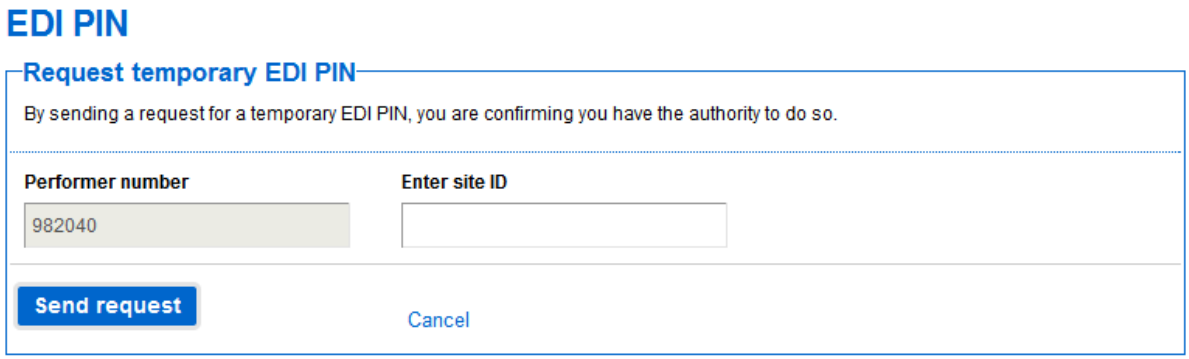

EDI PIN
Request temporary EDI PIN
By sending a request for a temporary EDI PIN, you are confirming you have the authority to do so.
Performer number
Enter site ID
982040
Send request
Cancel

Figure 24: Provider requests temporary EDI PIN for Performer

After entering the site number and clicking the *Send request* button, the portal will ask for password confirmation. Having completed this, the temporary EDI PIN request will be sent for processing.

Alternatively you may discontinue the request at any stage by clicking the *Cancel* button.
If an additional PIN(s) is required for the same performer then further requests can be made, providing they are not for the same site number.

Once the request has been sent you will be returned to the Temporary EDI PIN page with a confirmation of request(s) displayed [Figure 25]. You will receive a response for the request via email within 24 hours, the PIN number will not be held within the email this will be visible within the portal.

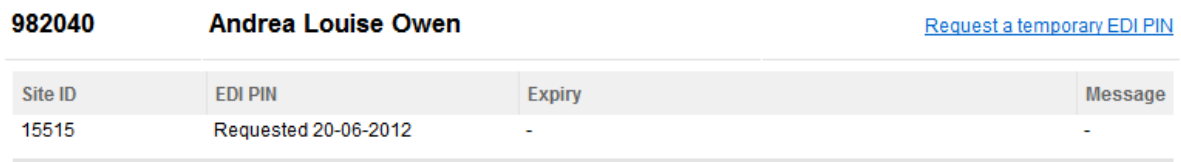


Figure 25: temporary EDI PIN request confirmation

After the request has been processed, you will receive an email confirming the request outcome (normally within approximately 24 hours) – *EDI PIN created* or *EDI PIN request rejected*. The outcome can also be verified (with the rejection reason if the request failed) on the portal EDI PIN page as per Figure 26 below.

- Performer 280992 has 2x EDI PIN requests logged –
    - The pin for site 12345 has been rejected.

- The pin for site 54321 has been approved and is listed [2222] alongside the *temporary* PIN expiry date – 30-07-2012.

- Performer 770213 has 1x EDI PIN request logged –
  - The PIN for site 12345 has been approved [1111] and expires 30-07-2012.

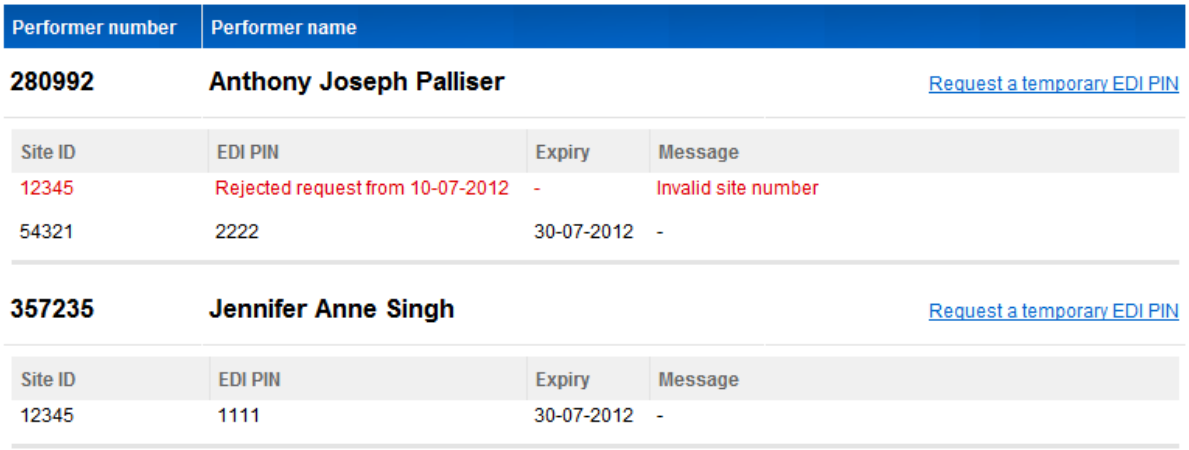


Figure 26: temporary EDI PIN status

10.2 Performer EDI PIN

As a performer the EDI PIN request relates to your personal EDI PIN number. As such, the page appearance is slightly less complex [Figure 27].

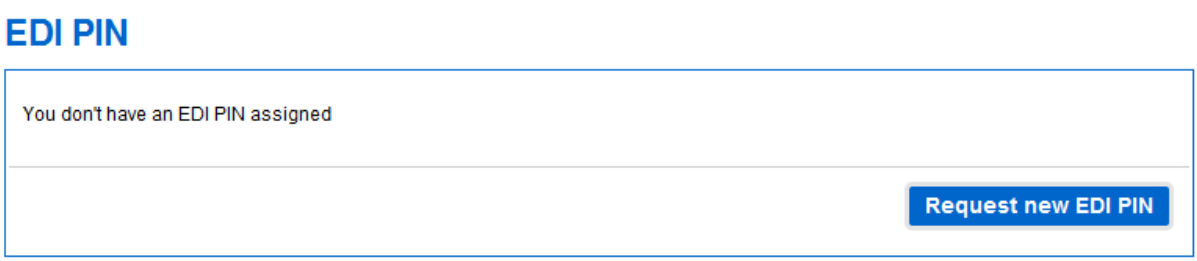


Figure 27: performer EDI PIN view

Clicking on the Request new EDI PIN button will redirect you to the confirm password page. Once your credentials have been verified the request will be logged [Figure 28]. You will receive a response for the request via email within 24 hours, the PIN number will not be held within the email this will be visible within the portal.

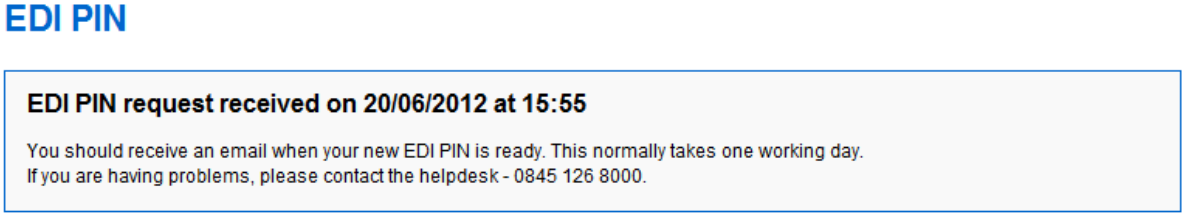

EDI PIN
EDI PIN request received on 20/06/2012 at 15:55
You should receive an email when your new EDI PIN is ready. This normally takes one working day.
If you are having problems, please contact the helpdesk - 0845 126 8000.

Figure 28: performer EDI PIN request confirmation

Once the request has been processed you will receive an email notification of the outcome, success or failure. You may view the EDI PIN page to obtain the PIN if the request was successful [Figure 29] or the rejection reason [Figure 30] if it could not be processed.

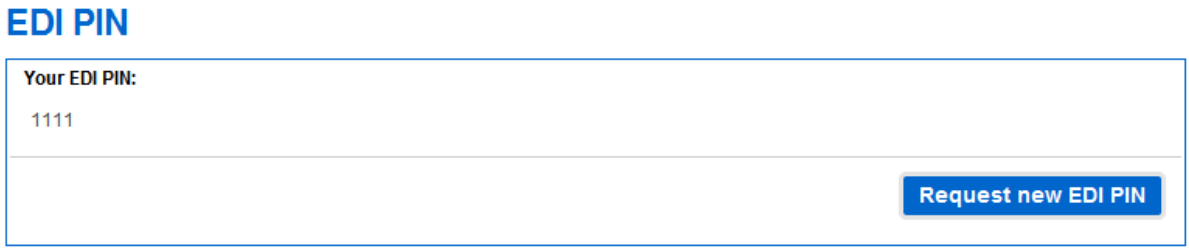


Figure 29: performer EDI PIN

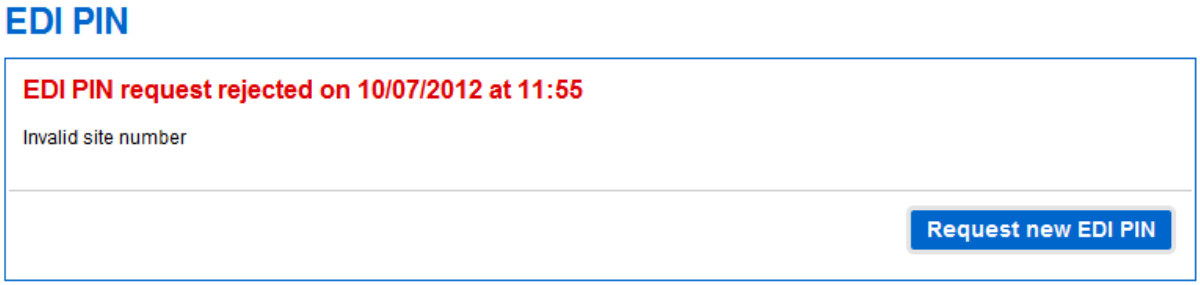


Figure 30: rejected performer EDI PIN

11 USER MANAGEMENT

It is possible for Providers to create additional user accounts and assign privileges and restrictions for the administration of various tasks within the portal. Providers can create and manage their administrator-users on the User management page.

11.1 Create an Administrator

The first time you navigate to the View and maintain user's page it will look like Figure 31 below. Once some administrator users have been created, we'll see a bit more activity.

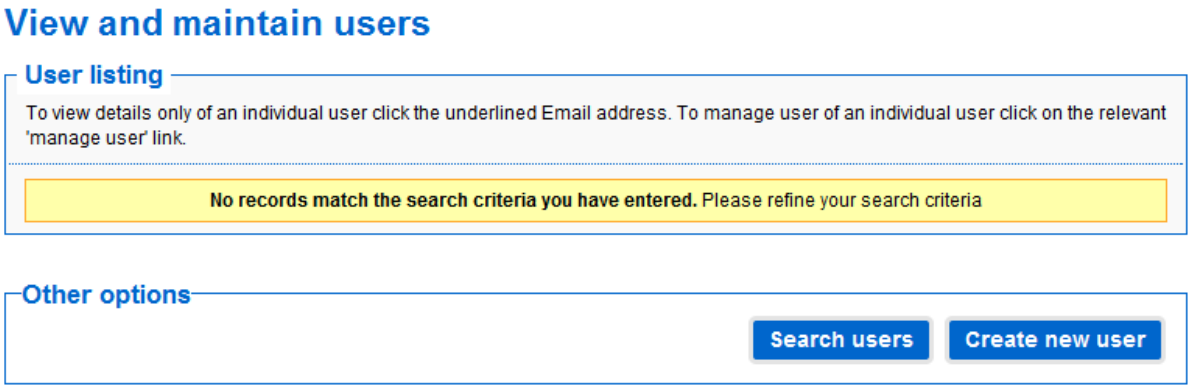

View and maintain users
User listing
To view details only of an individual user click the underlined Email address. To manage user of an individual user click on the relevant 'manage user' link.
No records match the search criteria you have entered. Please refine your search criteria
Other options
Search users
Create new user

Figure 31: manage users first view

Let's create our first one by clicking on the *Create new user* button. This will start the user creation process by requesting the following mandatory user details:

- New user email address
    - This is the email address that the portal will use to communicate with your admin-user. Be sure to use the correct address as they will need to activate their account (refer to section 2 Initial Steps for more information about the activation process) via the email address entered here. The email address should be unique. Duplicate email addresses will not be accepted by the system.

- New user forename
- New user surname
- New user telephone number

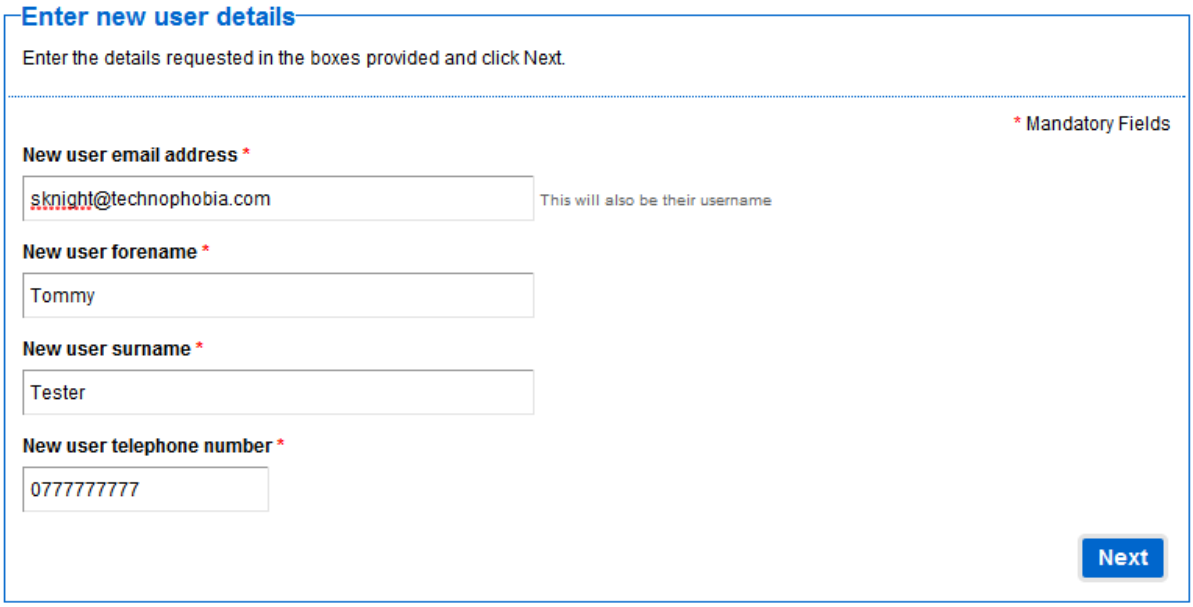


Figure 32: create admin-user - new details

Clicking on the *Next* button when done will check the details entered for any errors (e.g. the email address is not valid) and then progress to the next section – Assigning actions and contracts/providers to the user [Figure 33].

Check the appropriate box according to which contract(s) you would like your admin-user to be able to administrate on your behalf, then click the *Next* button to proceed when done.

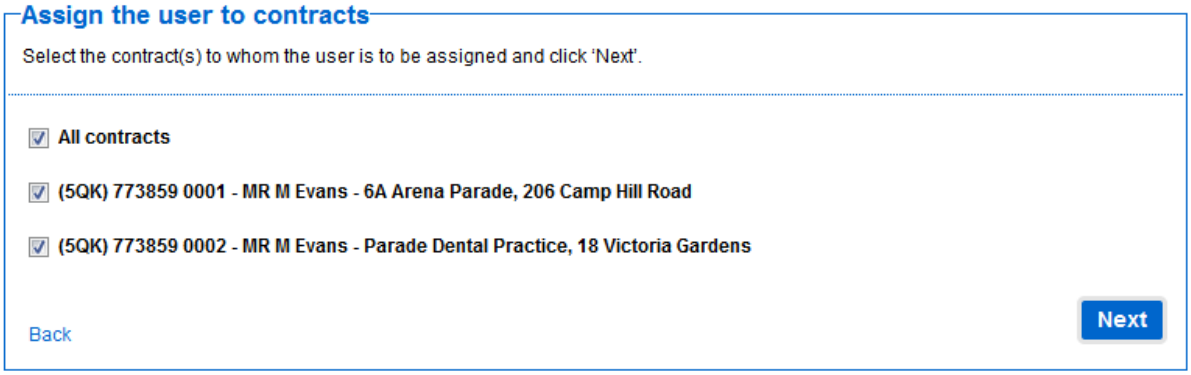

Assign the user to contracts
Select the contract(s) to whom the user is to be assigned and click 'Next'.
All contracts
(5QK) 773859 0001 - MR M Evans - 6A Arena Parade, 206 Camp Hill Road
(5QK) 773859 0002 - MR M Evans - Parade Dental Practice, 18 Victoria Gardens
Back
Next

Figure 33: create admin-user - assign or restrict contracts

On subsequent visits to the admin-user creation process, you will see the screen below [Figure 34] prior to the Assign contracts view. This provides you with the facility to simply assign contract/provider rights to the new user based on the privileges of a user created previously.

Selecting a user and then clicking on the *Copy user* button will assign the same contract/provider level privileges to the new admin-user as for the selected user.

Clicking on the *Don't copy* button will skip the assignment and take you to the Assign contracts page [Figure 33] for manual selection.

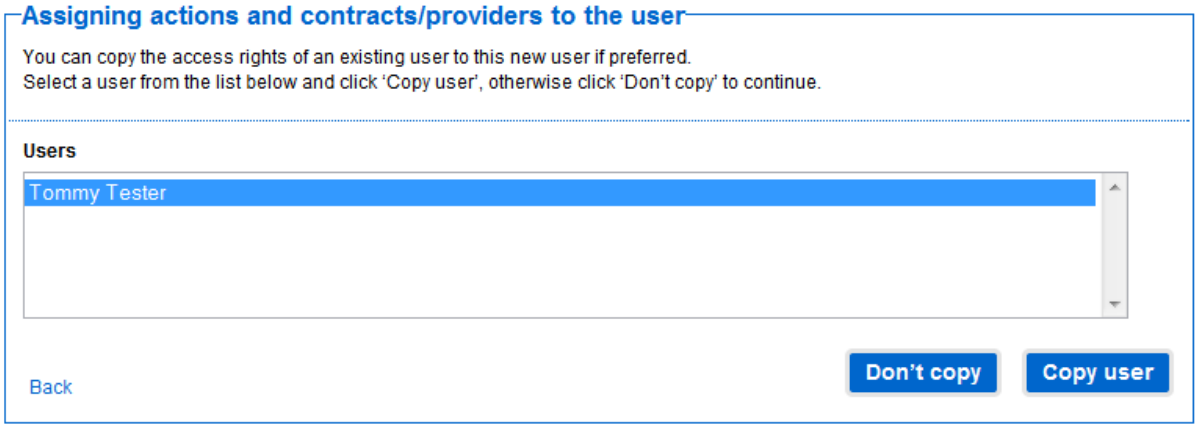

Assigning actions and contracts/providers to the user
You can copy the access rights of an existing user to this new user if preferred.
Select a user from the list below and click 'Copy user', otherwise click 'Don't copy' to continue.
Users
Tommy Tester
Back
Don't copy
Copy user

Figure 34: *optional* create admin-user step – assign actions based on another user

Once contracts and/or providers have been assigned, you may proceed to select which actions will be available to your new admin-user [Figure 35]. Check or uncheck the areas of the portal you wish to give the admin-user access to.

Note: The Manage Bank Details area requires access to Contracts also, since access to the Manage Bank Details area is *via* the Contracts pages. You *must* enable both Contracts and Manage Bank Details actions together, or neither.

Once done, click the *Next* button to proceed.

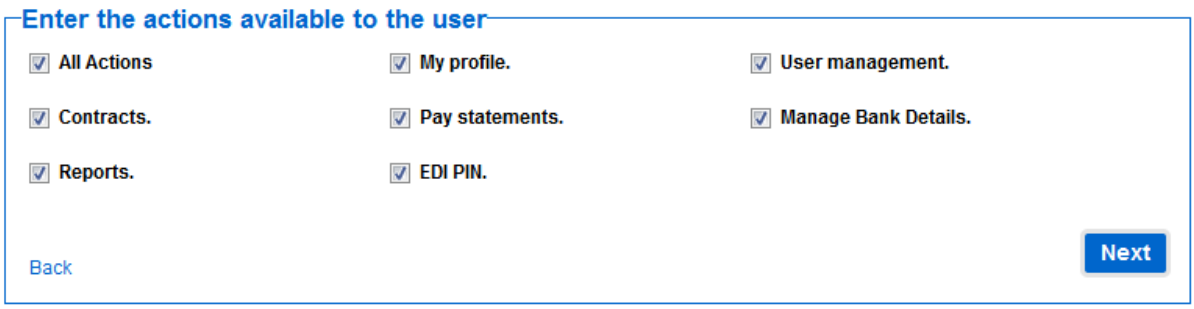


Figure 35: create admin-user - assign or restrict available actions

Having given your admin-user some credentials, access to contracts, providers and actions – we're done! A summary of your choices is displayed for you to confirm [Figure 36]. Click on the *Finish* button if you're happy. Otherwise, click *Back* through the admin-user creation pages and modify as required.

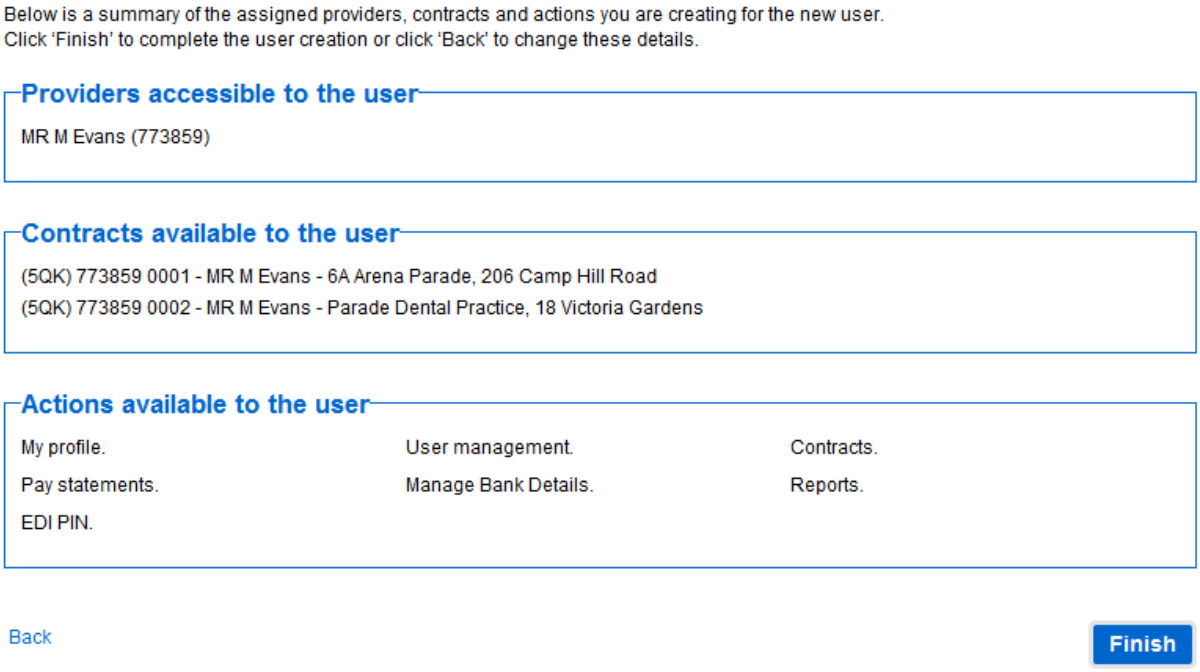

Below is a summary of the assigned providers, contracts and actions you are creating for the new user.
Click 'Finish' to complete the user creation or click 'Back' to change these details.
Providers accessible to the user
MR M Evans (773859)
Contracts available to the user
(5QK) 773859 0001 - MR M Evans - 6A Arena Parade, 206 Camp Hill Road
(5QK) 773859 0002 - MR M Evans - Parade Dental Practice, 18 Victoria Gardens
Actions available to the user
My profile.
User management.
Contracts.
Pay statements.
Manage Bank Details.
Reports.
EDI PIN.
Back
Finish

Figure 36: create admin-user - confirm details

Once done, a confirmation message is displayed [Figure 37]. An email will be sent to the users email address containing an activation link. Once activated [section 2 Initial Steps refers] your admin-user will be ready to go.

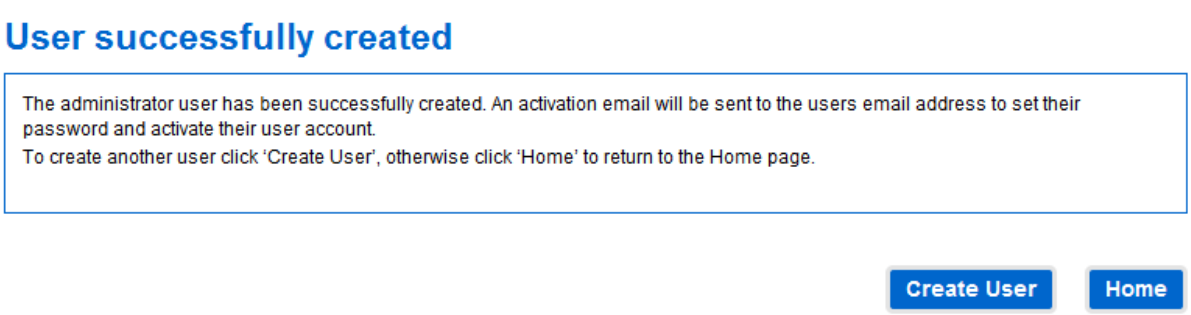

User successfully created
The administrator user has been successfully created. An activation email will be sent to the users email address to set their password and activate their user account.
To create another user click 'Create User', otherwise click 'Home' to return to the Home page.
Create User
Home

Figure 37: create admin-user - confirm creation

An overview of the permissions available to admin-users is included below for reference.

- Update the Provider(s) associated with the user
  - Where more than one provider is available, admin-users can be restricted to one or more providers as required using the *All providers* or individual provider checkboxes.
- Update the contracts accessible to the user
  - Where more than one contract is available, admin-users can be restricted to one or more contracts as required using the *All contracts* or individual contract checkboxes.
- Update the actions available to the user
  - The user may be restricted to areas of the portal by selecting or deselecting actions as required, or by checking the *All Actions* checkbox. Actions correspond to chapters of this document as follows:
    - Contracts – section 7
    - Reports – section 9
    - My Profile – section 6
    - Pay statements – section 8
    - EDI PIN – section 10
    - User management – section 11
    - Manage Bank Details - section 7.5

11.2 Manage Administrator Users

Once some admin-users have been created, we need to manage them. This can be done via the user management screens. Clicking on the User management link opens up the View and maintain users summary page with a list of all our admin-users [Figure 38].

We can see there are two admin-users listed below. One with an active account (i.e. they have received their activation link and used it to activate and login to their user account) and one non-active user [*Account status* column]. We can examine these users more closely by clicking on the *Manage user* link and thereby opening the User details view [Figure 39].

Clicking on the admin-user email address instead of the Manage user link will open up the User details view in non-editable mode. Clicking on the *Edit* button at the bottom of the page will enable you to make changes where required.

Note: The user details view will open by *default* if you have only one user (there is no *list* to display). Clicking on the *Edit* button enables changes to be made.

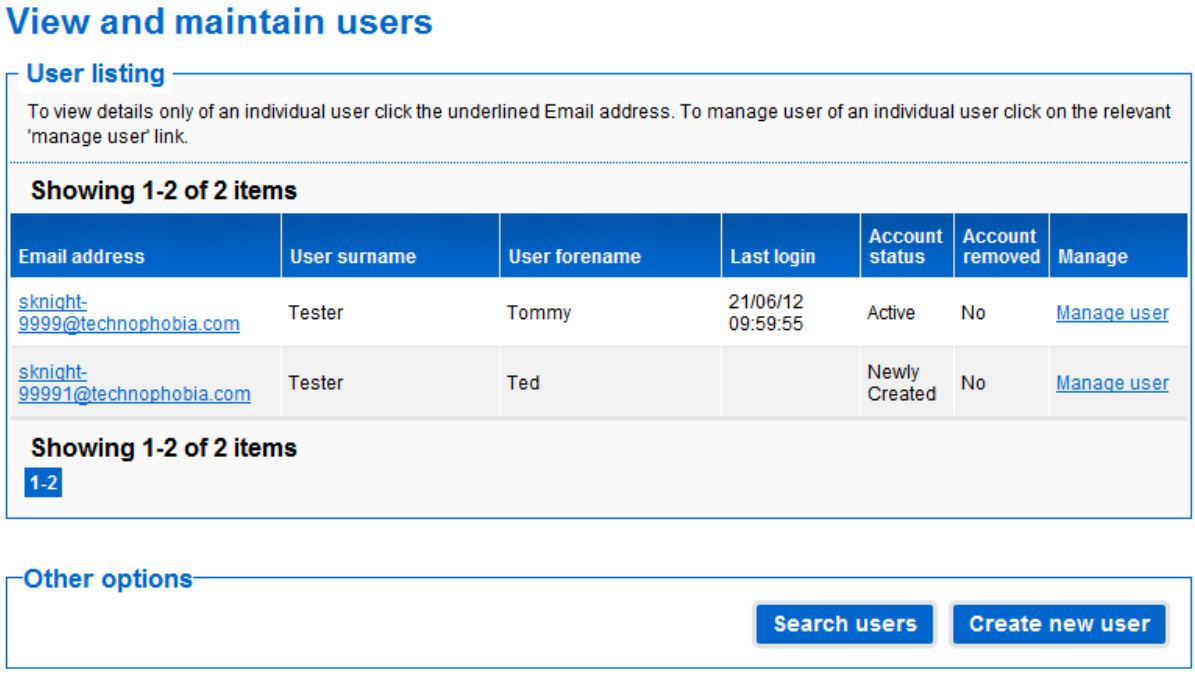


Figure 38: manage admin-users view

Once in the edit user details view [Figure 39], we can make various changes:

- User details
- Account locked
    - Check this box to force the admin-user to change their security credentials (password or memorable word) the next time they login.
    - Or, if the the user has forgotten their password checking this box will enable them to reset their details (section 4 – Forgotten Credentials refers).
- Account access removed
    - Check this box to remove the user-admin from the system. Please note that **this action is irreversible**. The user will not be able to login again using the same email – ever!
- Copy existing user profile
    - Copy provider or contract privileges from a previous admin-user.
- Update the Provider(s) associated with the user
    - Add or remove provider privileges by checking the relevant boxes.

- Update the contracts accessible to the user
    - Add or remove contract privileges by checking the relevant boxes.
- Update the actions available to the user
    - Add or remove action privileges by checking the relevant boxes.

When done, click Save to confirm the changes or Cancel to revert.

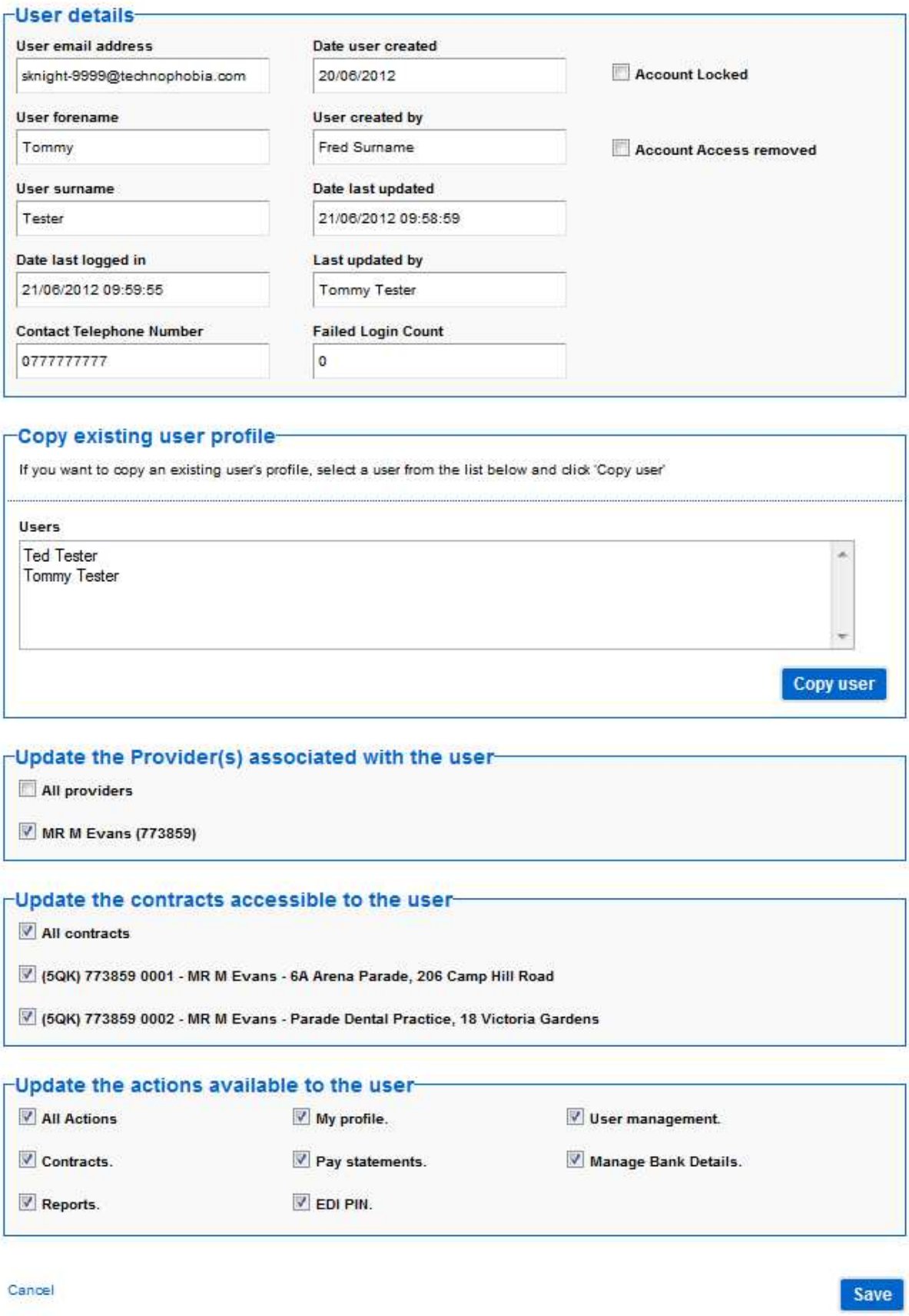


Figure 39: edit admin-user details view